Nova Scotia
Department of
Agriculture and Marketing

Annual Report

for the fiscal year ending March 31st, 1990

Marketing Services Branch

92-02654/

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Nova Scotia

Department of Agriculture and Marketing

Marketing Services Branch

We like to think that past and present challenges sharpen our skills for the future. We are now in the 1990's. It is natural to look upon the next decade as formative years in preparing to greet the twenty-first century. Food safety issues, environmental concerns, international trade agreements, interprovincial relations, research, education, communication, regulation, etc., constitute present marketing challenges which are expected to carry well into the next century.

This report relates in part the activities of the Marketing Services Branch in the period April 1, 1989 to March 31, 1990 and herein specifies the challenges which were addressed. By reading the individual reports, one gains an appreciation of the progress being made in marketing by commodity associations and private entrepreneurs. It is impressive to note the co-operation which exists among Branch members, the Department and the industry. It is also impressive to note the upgrading and personal development which is ongoing. Co-operation and self improvement are key ingredients in meeting today's and tomorrow's challenges. We look forward to the 1990's and beyond with confidence and enthusiasm.

As secretaries, technicians, casual employees and specialists, we are proud to be playing on a team which is contributing to the success of Nova Scotia agriculture. In submitting the 1989-90 Annual Report of the Marketing Services Branch we wish to give particular thanks to our Deputy Minister, Mr. Ralph Morehouse; our Executive Directors, Messrs. Roland Hayman, Richard Huggard and Arnold Rovers; other Branch Directors; and all the Department staff for their co-operation and support throughout the year.

Sincerely yours,

G. Brian Smith
Director

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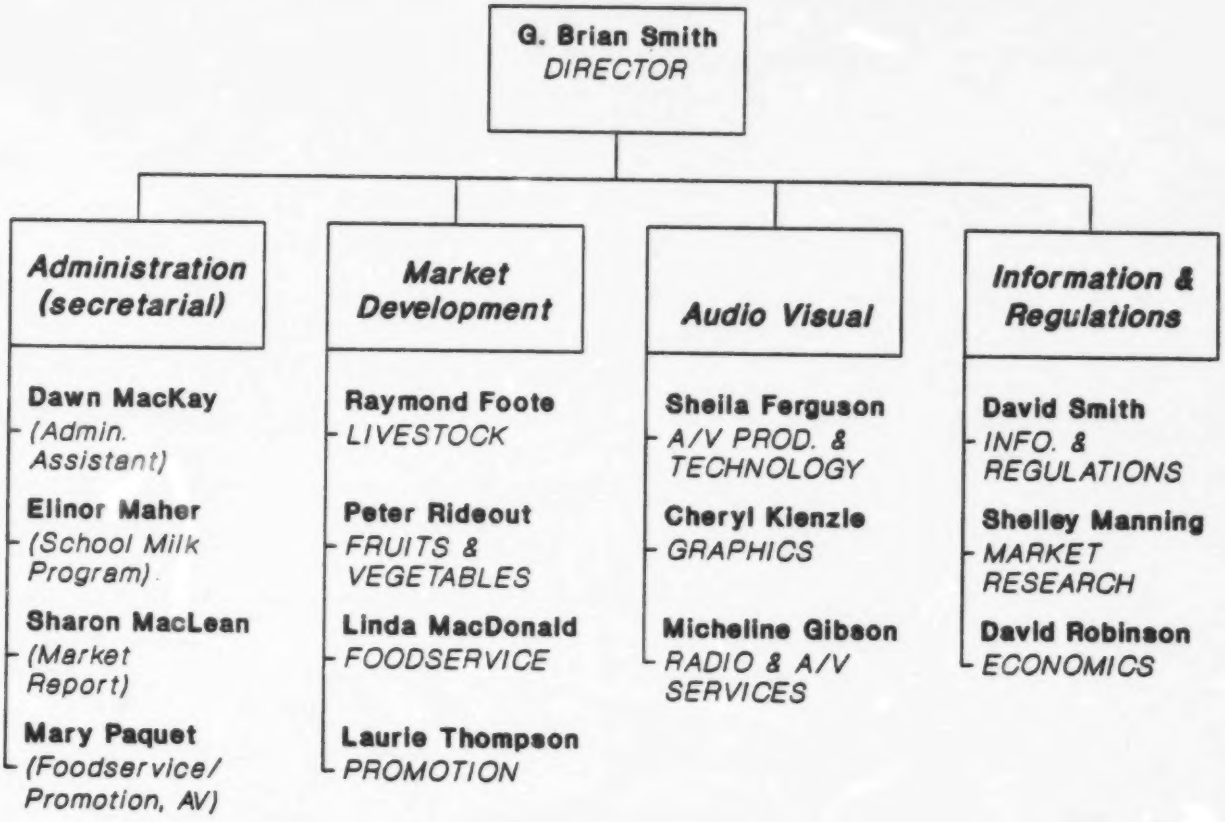
N.S. DEPT. OF AGRICULTURE & MARKETING

Marketing Services Branch - 1989 to 1990



MARKETING INFORMATION AND REGULATIONS

Economics

David E. Robinson, P.Ag.
Economist, Halifax, Nova Scotia

Marketing and Economics Services (until January, 1990)
Economics & Policy Analysis Section (subsequently)

ECONOMICS PROGRAM 1989-90

1. General Responsibilities and Duties

In January 1990 economic analysis was transferred from the Marketing and Economics Services to a separate Economic and Policy Analysis Section reporting to the Executive Director of the Agricultural Development Division. Throughout 1989-90 responsibility was maintained for providing economic analysis and associated services to the Department and industry with respect to policy issues and economic developments. This included the review and assessment of external studies and reports having significance for the agricultural industry and Nova Scotia as well as own research undertakings. A current perspective was maintained of the economic outlook for agriculture. Over 100 internal reports of varying depths were prepared on a wide range of economic matters for departmental and other purposes.

PROGRAM HIGHLIGHTS

2. GATT And Agriculture

The on-going multilateral trade negotiations (Uruguay Round) continued to be of great importance for agriculture in Nova Scotia and globally in 1989-90. Significant reports, issues and developments were encountered frequently throughout the year. An increasing body of research has been generated and has become available. Among provincial producers a high level of interest and concern has prevailed.

Two major conferences were attended during the year which dealt with agriculture and the trade negotiations. These both presented opportunities to gain the perspective of a wide range of industry, government and academic trade policy experts from Europe, the USA and across Canada. These were the AIC/CAEFMS meetings in Montreal in July with the special theme on agricultural trade and the University of Guelph/OMAF Conference, Agriculture in the Uruguay Round: The Final Stage in February, 1990. Papers and analysis with commentary were circulated upon returning to the province.

During the year four meetings of the Federal/Provincial Committee on the Multi-lateral Trade Negotiations Agriculture Group were attended. These allowed detailed briefings and presented opportunities to identify and raise

matters of particular significance for Nova Scotia. GATT developments were also discussed and dealt with (among other items) at three meetings of the Federal/Provincial Agricultural Trade Policy Committee attended during the year.

A provincial discussion paper was prepared to complement a circulated federal paper on achieving effective and equitable GATT rules for agricultural trade. Assistance was subsequently given in the formulation of provincial positions pertaining to the issues and strategies raised by the Canadian negotiators.

Six meetings were held with the Nova Scotia Federation of Agriculture (NSFA) Trade Committee to exchange information and to identify and assess aspects of the negotiations of importance to Nova Scotia. A Maritime Farmers Council Working Meeting on GATT and Agriculture was attended and assistance was given in the formulation of a policy statement by that organization. A special meeting was arranged with egg industry representatives to discuss the sector's concerns. A seminar on supply management and the GATT in Kentville sponsored by the poultry marketing boards was attended.

3. Federal/Provincial Agricultural Trade Policy Committee

The province of Nova Scotia was represented on the Federal/Provincial Agricultural Trade Policy Committee in supplement to the Director of Marketing. Assistance was given in the identification and assessment of interprovincial trade barriers and in the formulation of approaches towards improving the conditions for interprovincial trade in agricultural products.

4. Accelerated Tariff Elimination

Provisions within the Canada/US Trade Agreement allow for the accelerated elimination of Canadian and US tariffs if agreement to do so is reached. A number of US and Canadian tariffs unfavourable for businesses in Nova Scotia were identified and discussed with the businesses involved. Requests for accelerated elimination were also made directly to the (federal) Interdepartmental Committee from the province in the case of a number of feed ingredients. As of April 1, 1990, tariffs were eliminated for some items of direct, indirect and potential benefit for agriculture in Nova Scotia. These included beef, honey and grain sorghum.

Late in the year assistance was given to Pork Nova Scotia in an attempt to resubmit yellow dent corn for consideration in a second round of tariff cuts.

5. Nova Scotia Adjustment Advisory Council

Assistance was given to the Nova Scotia Adjustment Advisory Council in the analysis and investigation of matters raised by agricultural groups and businesses concerning the impact of the Canada/US Trade Agreement. The Council's subsequent report contained a separate chapter on agriculture.

6. Feed Grain and Related Policies

Many developments were under way during the year which involved feed grain and related policies. The (federally appointed) FFA Review Committee reported

during the spring. Much work had been undertaken in 1988-89 to assist the Committee in the development of more effective policies and beneficial program changes for the region. The committee's report (the "Fenety Report") did not, however, address the structural problems in the present feed grain policy and market position of Atlantic Canada nor the historic policy inequities which had been raised. The two Maritime producers appointed to the Committee did not concur with sections of the (majority) report. (Many of the outstanding policy problems and issues were subsequently dealt with by the Deputies Paper on Agricultural Transportation and are now further being addressed by the Agricultural Policy Review's Transportation Task Force).

Minor adjustments were made in the FFA Program later in the fall in accordance with the report's recommendations. FFA rates in Nova Scotia were increased slightly by an overall average of about $0.98/tonne. FFA was, however, removed from millfeeds costing Dover Mills approximately $140,000 and assistance was lowered to Kings County. Assistance was given to Dover Mills and to Kings County producers in seeking re-appraisal of their situations. A temporary partial restoration was secured for Kings County.

Upon the termination of the Review a policy discussion paper which concerned FFA adjustments in British Columbia (B.C.) in 1977 was released. This had been sought through access-to-information procedures after its significance had been raised in a Nova Scotia Department of Agriculture and Marketing (NSDAM) Economic Report. This document confirmed the analysis and tentative conclusions of the earlier report circulated in January 1989 as to the historic practice of establishing identical feed freight equalization levels in British Columbia and the Maritimes. The lower level of equalization maintained in Nova Scotia subsequently was an inexplicable departure in the policy. This has cost the provincial industry in excess of $60 million. Legal recourse was investigated but would appear unlikely to produce satisfactory results.

A discussion paper, "Feed Grain Policy and Atlantic Canada", was prepared together with A. Rovers on behalf of the Atlantic Provinces for the Interprovincial and Federal/Provincial Conference of Ministers and Deputy Ministers of Agriculture. This conference subsequently established a working group that prepared, under the direction of deputies, a national progress report on agricultural transportation issues. (See Federal/Provincial Deputy Ministers' Paper on Agricultural Transportation Issues, November 1989, 16 pp.). The three Maritime Provinces were represented on this group. Some progress was made in achieving a more balanced presentation of particular Maritime issues and problems compared with the results of a number of previous national reviews. A better appreciation was hopefully also gained by the other provinces and federal officials of i) a number of feed cost increasing restrictions which have worsened the Maritime feed grain situation, ii) the advantages of changing the FFA method-of-payment in Nova Scotia, and iii) the arbitrary nature of the lowering of the FFA equalization basis in the Maritimes relative to British Columbia.

The Deputies' Paper was released for the Agricultural Policy Review Conference held in Ottawa in December.

During the first quarter of 1990 the present Agricultural Policy Review Task Force was established along with a FFA subcommittee. Service is being given on both. In addition to problems with the operation of the FFA Program, this group will be examining the implications of changes in the Western Grain Transportation Act and in the minimum compensatory freight rates for canola.

A briefing on feed grain policy developments was given to a large group of interested producers at a meeting arranged by the NSFA in Kentville in August. These producers subsequently formed the NSFA Feed Grain Policy Group and attempts have been made to update them regularly on a number of policy issues and market developments. Papers on the region's feed grain situation and policy issues were presented during the year to the NSDAM staff conference and to the Atlantic Food Committee in Charlottetown. An assessment was done on the ramifications of the termination of the Livestock Feed Board of Canada.

7. Corn Countervail Duty Submission

Federal government intentions to hold a public interest hearing on the countervailing duty on US corn in the summer of 1989 had been stated on a number of occasions. Preparations were made for this hearing which, however, was not held as planned. During the fall the firm interest in such a hearing was expressed by Maritime Provinces' farm and industry groups and in November a preliminary examination to see if there was a need for a public interest hearing was announced by the Canadian International Trade Tribunal.

A joint submission for the NSDAM and the NSFA was prepared which supported the need for a hearing as soon as possible. In addition, since a request for a Nova Scotia exemption in 1988 had not been considered on the grounds that a public interest hearing was pending, it was decided to reapply for an exemption pursuant to Section 76 of the Special Imports Measure Act.

It was estimated that the countervailing duty increased feed costs in Nova Scotia over the August 1988 to September 1989 period by $2.25 million. On April 9, 1990 the Canadian International Trade Tribunal ruled against conducting a review which could have led to the granting of a regional exemption. This decision was based upon the grounds that there had not been a material change in circumstances since the countervail was originally put into place.

(See: Submission to the Canadian International Trade Tribunal Requesting an Exemption from the Countervailing Duty on US Corn Pursuant to Section 76 of the Special Imports Measures Act and Further Respecting the Preliminary Examination of Public Interest Issues by the NSFA and the NSDAM, November 1989, 29 pp.).

Prior to the announcement regarding the preliminary examination, assistance was given in September to the NSFA in pursuing an arrangement for the remittance of the countervail duty. The Ontario industry did not, however, give the necessary support for the further development of this option.

8. "At and East" Export Grain Program Termination

The "At and East" Export Grain Program was terminated in 1989. Analysis of the impact of this development was undertaken and a number of changes in national policies which could improve the position on the Halifax Elevator were identified. These were reported to the Atlantic Provinces Transportation Commission and others and became components of the overall regional strategy in dealing with the situation and improving the future prospects of the Halifax operation and the associated risks for the local grain trade. Such offsets were also presented directly at a meeting arranged by Transport Canada for dealing with the ramifications of the termination of the Program.

One of these approaches investigated involved changes to grain transportation regulations to allow the water transportation system to access prairie-purchased grain in the same manner as the railway movement does for "Plan C" grain. This was examined subsequently at a one-day conference organized together with the National Grains Bureau in Winnipeg on Oct. 5. There were 27 in attendance including 13 from the Atlantic Provinces. A further forum to consider regulatory changes in this area was organized for April 17, 1990 in Kentville.

A paper "Problems Facing Atlantic Feed Grain Users", 15 pp., was presented in Winnipeg. This raised a number of institutional problems and impediments which have worsened the regional feed grain situation in the 1980's. Beyond the one-day conference this paper served to initiate regional examination of irregularities pertaining to statutory duties and conditions established by the Livestock Feed Assistance Act.

Close contact was maintained with the Halifax Elevator to keep appraised of their operating position and opportunities to assist in their adjustment to the loss of the winter export movement.

9. Grain Sorghum Study

A study was undertaken on the economics of importing grain sorghum as a corn substitute feed ingredient. A draft report has been circulated for commentary to the feed trade and following some revisions this will be circulated more widely. It was estimated that at moderate volumes grain sorghum imports during 1988-89 (a season of relatively high domestic corn prices) could have reduced feed costs in Nova Scotia by $0.5-0.9 million).

10. Greenhouse Vegetable Returns Survey and Market Analysis

Greenhouse vegetable growers sought special provincial assistance in 1989 to compensate for depressed industry returns in 1988 which they felt were related to the construction and operation of a large greenhouse complex in St. John's. This had been largely sponsored by the province of Newfoundland. A survey and audit of large greenhouse vegetable growers was undertaken to better assess the change in per unit returns in 1987-88.

It was determined that overall average returns were lower in 1988 for cucumbers while tomato returns were higher. The price change in the case of cucumbers, while highly variable from operator to operator, appeared to have averaged between 1% and 5% for the group. A number of developments in Ontario and a temik scare in the US were assessed as having had a more direct and measurable impact upon local returns as compared with the 1988 Newfoundland marketings.

11. Tripartite Stabilization

Upon the provincial sector's entrance into the national tripartite stabilization plan for hogs, a number of national programs and measures which increase production costs in Nova Scotia were identified. These were then reported to industry and provincial officials involved in the comparative estimation of industry support levels across Canada. The provisions for entering such

"negative subsidies" into the support calculations were also outlined. Subsequently, adjustments for the identified policies and their effects were negotiated by those directly involved in the implementation of the tripartite agreement. Assistance was given to subsequent assessments of the economic cost and impact of these measures in a few instances.

12. Agricultural Statistics

The annual meeting of the Federal/Provincial Agricultural Statistics Committee was attended and a report was made on the use and statistical requirement in Nova Scotia. Plans for the 1991 Census of Agriculture as well as changes and developments in other components of the national agricultural statistics program were reviewed and discussed in detail.

A special meeting on the need and availability of farm financial statistics was held in Truro on October 3. Two Statistics Canada Agriculture Division staff members from Ottawa outlined developments in this area along with existing products.

The annual Agricultural Statistics publication was modified slightly and the 1989 edition was made available in January. Assistance was given to a review of miscellaneous crop and livestock receipts estimation procedures for Nova Scotia.

13. Economic Commentary/Departmental

Six Economic Research Notes were circulated internally on a variety of topics in 1988-89. A more detailed version of the 1990 Agriculture Year End Review statement (compared with the press released version) was also circulated within the Department.

14. ALFI Evaluation Committee

Service on the ALFI Evaluation Committee was continued in 1988-89. The Committee directed a mid-term evaluation conducted by consultants. A number of special data sets on feed utilization were estimated for the use of the consultants in completing their report.

Marketing Research

Shelley L.F. Manning, P.Ag.
Market Research/Analyst

INTRODUCTION

The report to follow outlines the major initiatives and program activities undertaken by this office in the area of market research. The report will begin with a review of the duties and responsibilities of the market research/analyst, followed by a discussion of the activities carried out for the period April 1, 1989 to March 31, 1990. The activities are categorized in the following manner:

I General Duties and Responsibilities
II Market Information
III Market Research
IV Special Conferences, Events and Seminars
V Market Education and Extension

I. GENERAL DUTIES AND RESPONSIBILITIES

The general duties of this office include responsibility for the Branch's programs and services as they relate to agricultural marketing research and agricultural market and economic analysis: to aid the Department and the Nova Scotia agri-food industry in planning, designing, implementing and interpreting market research and analyses as it pertains to the agri-food industry. This involves the review and assessment of current research and its relevance to the Nova Scotia agri-food industry as well as responding to the needs of our marketing specialists in the area of market research.

The bulk of the projects and activities undertaken by this office have been initiated by the Specialists within the Branch and encompass a wide range of topics and commodities.

II. MARKET INFORMATION

The Marketing Services Branch is one of the primary sources of timely market information for the agricultural industry and has thus made a substantial commitment to the provision of market information. This office has been involved with the review, assessment, and implementation of an electronic information service: The NSDAM Remote Bulletin Board System (RBBS).

The rbbs is quite simply a method of transmitting information electronically. It enables the timely transfer of information from one computer to another via telephone lines. In addition to the ability to access a variety of information, the rbbs can be used to communicate with users of the system.

Our remote bulletin board carries a number of news items, markets information, farm management information, and newsletters from numerous branches of NSDAM. The information available includes livestock prices (locally, nationally and

some international markets), fruit and vegetable prices (from local and major Canadian markets) grain prices, feed prices, N.S. Dairy Commission monthly newsletter, supply forecasts, tree fruits and market updates, price outlooks, as well as local commodity price trend data available for downloading.

Effective December 1, 1989 the bulletin board system became available 24 hours daily. This was made possible with assistance from the Agri-Food Development Agreement. Through AFDA we installed the equipment necessary to make our system available through DATAPAC (enabling 24 hour daily access and reduced long distance calling charges for users). With DATAPAC individuals in the following toll areas call Truro free of charge:

New Glasgow, Sydney, Amherst, Halifax, Kentville, Bridgewater and Yarmouth. The installation of DATAPAC has provided extra problems at our end but encouraged usage by interested individuals in the agri-food industry. During the past year monthly calls to our system have increased from an average of 20 to 30 calls/monthly to over 100 calls/monthly.

Education is still necessary to provide potential users with information to ease the accessing process. Like any new technology, particularly in the field of electronics, a slow learning curve exists. We continue to speak at computer short courses and respond to individual request for hook-up information.

As the system expands (with increased usage and quantities of information) a need exists for an individual to: address requests for information; provide workshops; actively market the system; and provide guidance on new and improved changes in the technology to keep our producers on a leading edge.

MARKETING FACT SHEETS

Two issues were published: one providing a summary of our N.S. Beef consumer study and the other summarizing Agriculture Canada's research on consumers perception of freshness in processed and unprocessed foods.

MARKETING UPDATES

One issue was published. This issue provides general information regarding our RBBS as well as specific connecting information through the DATAPAC system.

TREE FRUIT MARKET UPDATE

This office along with Marketing Specialist, Peter Rideout designed a new newsletter to provide a more comprehensive tracking of tree fruit markets. This newsletter was sent to apple producers on a weekly basis from September 22nd to February, 1990.

III. MARKET RESEARCH

The majority of projects addressed by this office are a result of internal requests. Major projects have been completed or are on-going with Direct Marketing in Nova Scotia, N.S. Fox Breeders Association, the Lamb Industry and the Foodservice Industry.

DIRECT MARKETING IN NOVA SCOTIA

This office acted as co-ordinator of a study to review direct marketing in Nova Scotia. In-depth interviews were held with the operators of roadside

markets, pick-your-own markets and Farmers' Markets (including both supporting associations and producers). We also tabulated and analyzed the data and gave it to the consultant, hired under AFDA, to write up the report.

In addition, this office conducted a telephone survey of consumers in Nova Scotia to identify the direct market consumers and ascertain their needs and attitudes towards these markets. A survey of consumers at farmers' markets was also conducted through this office.

FOX MARKET STUDY

This office through the Livestock Specialist, was contacted to assist in an assessment of the N.S. fox industry and market development program. This office acted as project leader and assisted in the preparations of the terms of reference and project proposal. The objective of the study was "to provide an organization model that designs a co-ordinated market program, tied in with a Canada wide organization that derives maximum market returns to producers for high quality furs".

This project is close to completion and reports will be distributed to provincial fox organizations.

N.S. LAMB MARKET REVIEW

In the fall of 1989, this office in co-operation with the Livestock Specialist, undertook a study of the lamb industry in Nova Scotia. The project examined current production, processing and consumption patterns of lamb. Information was obtained to:

1) develop a profile of producers' marketing activities
2) identify the available volume of fresh lamb for wholesale delivery
3) determine the facilities available for slaughtering lamb and the volume currently being slaughtered, and
4) identify N.S. consumer attitudes, purchase behaviour and usage of fresh lamb.

N.S. FOODSERVICE STUDY

This office, working in co-operation with the Foodservice Specialist, co-ordinated a research project to review the foodservice industry in Nova Scotia. The study provides the following:

1) A review of the size of the industry
2) A determination of sources and specifications of products used
3) An examination of purchasing practices

"Armstrong Select Nova Scotia Beef" Pilot Project

This office has been involved with the preparation of the evaluation plan for this project. This plan began with in-store surveys of consumers at two IGA stores in Halifax to determine which label would be most accepted/appealing/ meaningful for Armstrong's Select Beef. Further evaluations are planned to provide:

1) a broad view of consumers' preferences
2) analysis of in-home trial of Armstrong's Select Beef (providing overall acceptance and purchase intention), and

3) a blind taste test to determine if consumers can distinguish between N.S. and Western beef.

A number of smaller projects were completed by this office and are as follows:

Carrot & Onion Market Assessment - Data for an assessment of the market potential of carrots and onions in the Atlantic Region was prepared for the Marketing Specialist (fruit & vegetables).

Harvest Food Fest - This office assisted the foodservice specialist by tabulating and analyzing data received from taste panels at the Harvest Food Fest. Six different products were tested.

Fruit and Vegetable Price Tracking- A series of prices of fruit and vegetables are currently being maintained. The series provides averages and trends of prices for the last 6 years from Halifax and Sydney and commencing August '89 prices from Montreal and Toronto.

Cottage Scale Fur Industry - A request was received for information regarding market opportunities both at home and abroad for locally made Fox jackets. This office used the Trade Centre "Network" to solicit interested parties. These responses were passed on to the individual to follow up further (from Asian and North American companies) opportunities.

IV. SPECIAL CONFERENCES, EVENTS AND SEMINARS

Modified Atmosphere Packaging Research Project-Toronto, May 1, 1989

Met with the consultants and steering committee to receive and discuss the preliminary results of the Modified Atmosphere packaging study.

Montreal Fur Fair - Montreal May 3-6, 1989

This office, along with a representative of NSFBA, Tom Taggart, attended the Montreal Fur Fair. The trip was investigative to provide background and contacts for the upcoming research project.

International Maple Syrup Institute Annual Meeting, Levis, Quebec
October 21-22, 1989

This office attended the annual meeting of IMSI. The meeting provided information on technical, environmental and marketing issues.

Modified Atmosphere Packaging Presentation - Halifax October 4, 1989

The consultants conducting this market study were in Halifax to present their findings to the Federal/Provincial Marketing Council. We arranged a workshop/seminar for interested individuals in the agri-food industry. The meeting was attended by approximately 35 people from various sectors of the industry.

Marketing Conference - Charlottetown, November 28-30, 1989

This office attended this three day marketing conference. This conference brought together all segments of the agri-food industry for a series of concurrent lectures on a number of related marketing topics.

Staff Conference - Truro, January 11-12, 1990

This office participated in the bi-annual staff conference and set up the RBBS in the display area for our Branch. In addition a short up-date regarding the RBBS was given to the staff during the conference.

Greenhouse Growers Vegetable Marketing Board - January 24, 1990

This office attended a meeting of this group to provide information on methods of improving communicating between board members and ultimately the whole membership.

Agricultural Market Information Systems, (AMIS) Ottawa, February 6-7, 1990

This office attended a national meeting on AMIS possibilities and alternatives. The objective of the meeting was to provide an initial forum for discussion and presentation of information re: AMIS.

Surprisingly only Alberta, British Columbia and ourselves have systems readily available. Saskatchewan has an elaborate system, however, individuals wishing information must go to the extension office where a technician does the information search for the client. Alberta's system has been devoted to the needs of management relating to production, record keeping, computer information, etc. The only market information is their weekly grain and livestock report (an excellent summary of weekly activity in North America). They are flexible and can see a move to market oriented data.

British Columbia has developed an excellent information base of agricultural data and information of interest to British Columbia. Most of the statistical tables contain data on the province and in some cases, comparisons with other provinces and/or the national total. it is a very extensive service which they have set up in co-operation with their ministries of the Statistical Services Unit of the Ministry of Agriculture and Fisheries and the BC Trade Development Corporation through the BC Business Network (BCBC).

The general consensus from the group was the following:

Agriculture Canada would make information available electronically at a central unit such that provinces (or individuals) could access and make it available through their various sources. In turn any information that the provinces would like to make available to Agriculture Canada system would be accepted.

It was suggested that a presentation be made at the next federal/provincial market development meeting as such a project appears to fall under the mandate of such a group.

National Institute of Nutrition Seminar, March 5, 1990

This office attended a presentation of the findings of the first in a series of nutrition tracking surveys. The TNT (Tracking Consumer Trends) study provides an examination of Canadian attitudes and perceptions of fat and fibre.

Professional Marketing Research Society, March 20-23, 1990

This office attended 2 two-day seminars/workshops in Halifax. Both seminars were conducted by the Burke Institute and addressed various aspects of marketing research: "Marketing Research for Decision Makers" and "Customer Satisfaction Research". Both seminars were very informative and will prove useful for future projects undertaken by this office.

Direct Marketing Challenges '90, March 25-27, 1990

This office participated in this three day conference which emphasized providing information to direct marketers in Nova Scotia. A presentation was also made summarizing the findings of the study of direct markets(ers) in Nova Scotia.

The conference was well attended.

V. MARKET EDUCATION AND EXTENSION

Staffing Department Exhibits

Staffed Branch exhibit at the Atlantic Winter Fair, October 1989.

Assisted with the taste testing panel at the Food Fest, September, 1989.

Requests for Market Information

This office is providing a local herb grower with weekly herb prices in the Boston market.

Occasionally requests for prices of Belgium Endive in Boston and Montreal are received. These prices along with the herbs are attainable through PRONET which supplies daily USDA market prices.

This office provides daily data to the Marketing Specialist (fruit and vegetable) for the Market Line and weekly data for the Tree Fruit Market Update.

Exhibition Sub-committee

Served on this committee and completed assessments of two exhibitions; Cumberland County Exhibition and Eastern Nova Scotia Exhibition.

Remote Bulletin Board Workshop, February 8, 1990

This office made a presentation to a computer short course on communication possibilities with computers and more specifically connecting procedures for our RBBS.

Committees

This office served on the following committees:

Steering committee of direct market study
Steering committee of direct market challenges '90 conference
Steering committee Fox Market Research
Steering committee of foodservice research study
Steering committee of Modified Atmosphere Packaging study

Marketing Information & Regulations

David M. Smith, P.Ag.
Marketing Specialist

I. Market Information

Market Report - This bi-weekly report is mailed to approximately 1500 producers and agri-business persons. It reports weekly prices of the major N.S. produced fruits and vegetables on the Halifax and Sydney markets. As well, weekly prices as provided by the respective marketing boards for eggs, chicken, turkey and hogs are reported. The weekly sales at the Maritime Cattle Market are also reported. This covers cattle, sheep, hogs and goats.

In February, 1989 our mailing list was purged. This reduced the mailing numbers to approximately 1100. However, this rapidly increased to its present numbers.

As in previous years an annual summary of the 26 reports was compiled and was mailed along with the February 24 issue of the Report.

Keeping with the computer age, much of this information is also fed into our Remote Bulletin Board which services those with computers.

The addition of a facimile machine in our office has greatly improved our rapid access for market information.

Other - This office continues to receive requests for price information on small volume crops. With improved contact with Boston and Montreal markets through our computer hook-up, we are able to obtain the latest competitive prices within minutes.

There has been a marked increase in the sale of hay both on domestic and foreign markets. To this end, we have involved ourselves with the marketing efforts of the Scotia Hay Co-operative. This includes gathering price information and directing inquiries to them.

II. School Milk Program

The School Milk Program continues to be well accepted by the school population. In September, 1989, 539 schools registered in the Program which was 95% of the total schools eligible. This is down four schools from the previous year but the percentage remained the same due to the reduction in the eligible schools.

Actual consumption per school was up slightly. This increase along with a Commission price increase resulted in an increased pay-out by the Department to approximately $1.8 million which is up from $1.66 million in 1988-89.

The Program has now endured six Commission price increases since the student price was raised to 20 cents in 1986.

The selection of the type of milk consumed at the schools appears to parallel the general market trend, that of lower fat content. We note that 2% sales are increasing over homo and a significant volume of skim is now being sold through the Program.

Milk Nova Scotia, the promotional arm of the dairy industry, continued in an active promotion of milk in the schools.

III. Tariff

This office continued as tariff co-ordinator for the Maritime Zone in the application and removal of seasonal tariff on imported fruits and vegetables into the Maritime Provinces.

For the 1989-90 year the following tariffs were utilized:

	APPLIED	CANCELLED
Beans, snap	7/21	10/26
Beets	7/21	3/31
Broccoli	9/19	12/6
Cabbage	6/28 1/4	9/19 3/31
Carrots	8/4	3/31
Cauliflower	9/19	10/17
Corn-on-Cob	8/4	10/27
Cucumbers	5/16	11/2
Lettuce, Head & other	6/27	10/6
Onions, green	7/21	12/14
Pears	9/8	3/31
Plums	9/8	10/17
Prune Plums	9/8	10/17
Strawberries	6/23	8/17
Tomatoes	5/16	10/17

As tariff co-ordinator we were advised of Canadian companies requesting duty-drawback on imported produce not available in Canada. In 1989, there were no products relative to Maritime production.

This office served as a provincial government representative on the Free Trade Canadian Working Group, Dairy Fruit and Vegetable sub-group. We were called upon to advise on proposed accelerated elimination of certain tariff items. We also served on similar groups dealing with Food Additives and Packaging & Labeling.

IV. Regulations

As administrators and advisors to the Minister's office regarding the Nova Scotia Fruit and Vegetable Regulations we maintained our liason with the federal inspectors who enforce our regulations.

During the year we handled inquires from the inspectors as to interpretation of our regulations and from producers who were preparing their products for market.

There were 87 detentions issued by inspectors at wholesale and shipping

points. The products affected were mostly apples and a few lots of potatoes. These were subsequently regraded, the culls removed, and the remainder released for sale.

The recently passed CA Regulations were put into force in 1989. In doing this the Deputy Minister has directed that applications for dealer and plant licenses are to be handled by Hort. and Biology's Kentville office.

The packaging and labelling of mixed vegetables gave us some concerns in 1989. However, with the co-operation of the retail inspectors, any action was left in abeyance until suitable regulations are prepared.

We have had considerable correspondence and some meetings on the the topic of sustainable agriculture. Attempts at forming legislation have been slow because of the defining of "organic" and "natural" and devising of logical procedures in enforcing such legislation.

Two experimental grades were authorized by our Minister in 1989, namely, mini potatoes and canner tomatoes.

We worked with George Smith in preparing proposed Processed Egg Produce Regulations. We used the federal model as a guideline.

On three occasions we acted as recording secretary at Chicken Board price negotiating meetings.

Attended a meeting in Toronto of the Federal Provincial Market Development Committee. Here, several interprovincial trade barriers were examined.

V. Special Projects

Fresh Blueberry Market - We convened two meetings of fresh blueberry packers. The first was a pre-market meeting on June 5 at which 12 packers attended. The agenda included crop outlook, containers, grading, promotion and suggested prices. A second meeting was held in October at which the 1989 market was assessed. It was agreed that these meetings were useful in stabilizing prices throughout the marketing season. One grower has much improved pick-over line which gave him greater access to markets with the resultant larger volume.

We assisted in preparing promotion and information material for a special promotion done on the Boston market in August.

Endive Market - On behalf of endive producer, Jan Punt, we investigated endive markets, where they are currently sourced, prices, etc.

Herb Market - Worked with John Sipos, Maitland in designing labels for his herb production.

Forest Mushroom Market - The activity on this market was greatly reduced in 1989. Production was somewhat reduced. One active packer of former years, Albert Kral withdrew in 1989. We attempted to interest Shirley Kehoe who bought for Kral in the past but she declined to get into the shipping business. Gordon Muir, Scotsburn expressed an interest but he lacked the facilities. Gordon Hart another potential shipper, did not appear to have the enthusiasm he had in former years. Oxford Frozen Foods had other commitments at that time. Garret Wingrave, a buyer of former years in Ontario was on the

phone to us a couple of times, but our suggested leads didn't work out. As the season progressed, it turned out that we were better off being out of the market as European production was coming on strong and markets were weak.

Hay Market - Worked with Scotia Hay Co-op in getting their markets in place. Through various assistance programs they are improving their compacting and storage facilities. Their challenge now is to interest producers in producing a quality product.

Sustainable Agriculture - Attended a meeting to investigate the inclusion of Sustainable Agriculture in the NSAC program. There appeared to be mixed enthusiasm about the projects.

Newfoundland Show - We assembled and manned a booth at the Newfoundland Food and Agriculture Show in October. Here we featured apples, applesauce and YOR and in general "waved the flag" for Nova Scotia agricultural products.

VI. Miscellaneous

Horticultural Council - Attended the annual meeting of the Canadian Horticultural Council held in Ottawa and served on several Committees of that organization.

Atlantic Winter Fair - Manned our booth for two shifts and assisted in dismantling at the conclusion.

Garden & Patio Show - Did a shift at manning the NSDA&M both at the initial Garden & Patio Show, Halifax.

N.S. Natural Products Marketing Council

Stuart F. Allaby, Chairman
G. Brian Smith, Secretary

Under the authority of the Natural Products Act, the Natural Products Marketing Council supervises the activities of the agricultural commodity marketing boards within the province. These boards are listed below:

- Nova Scotia Wool Marketing Board
- Pork Producers' Marketing Board of Nova Scotia
- Nova Scotia Chicken Marketing Board
- Nova Scotia Egg and Pullet Producers' Marketing Board
- Nova Scotia Turkey Marketing Board
- Nova Scotia Flue-Cured Tobacco Growers' Marketing Board
- Nova Scotia Processing Pea & Bean Growers' Marketing Board
- Nova Scotia Grain Marketing Board
- Nova Scotia Potato Marketing Board
- Nova Scotia Evening Primrose Marketing Board
- Nova Scotia Greenhouse Vegetable Marketing Board

Members of Council for 1989-90 were Stuart Allaby, Chairman; Harold Lusby; Laurie Hennigar; Don Gunn; and Alfred Scothorn. Jonathan Davies served as legal counsel, George Smith as special advisor on the feather industry, and Brian Smith as Secretary.

The Council met six times to deal with concerns, regulations, and plan amendments of commodity boards. The Council Chairman also heard four pricing appeals from the Nova Scotia Chicken Marketing Board.

Council hosted a national/provincial seminar at Liscombe Lodge July 17-20. Many of the annual commodity board meetings were attended by one or more members of Council. The Chairman attended the National Farm Products Marketing Council and provincial PAMSA seminar in Quebec February 26-28.

Nova Scotia Egg & Pullet Producers Marketing Board - Resolving the growing debt of the Canadian Egg Marketing Agency was the major concern of egg boards and supervisory bodies across Canada. Improvements in the debt situation of CEMA were noted by year's end.

Nova Scotia Turkey Marketing Board - On July 7, 1989 an agreement was reached by the Price Review Committee of the Board on a new live pricing formula. An amendment to the Proclamation and Marketing Plan on Multiplier Breeder Policy was signed by Council.

Nova Scotia Chicken Marketing Board - Four pricing arbitration meetings were dealt with by the Chairman during the past year. Since November 1989, a price formula has been in place with the need of arbitration eliminated, for the present. Council chaired an all industry group of processors, wholesalers, retailers and fast food industry representatives on behalf of the commodity board. From a national perspective, the fast food industry is

indicating a lack of product size and quality. A signatories meeting was called March 29, 1990 to deal with (1) the admission of the Northwest Territories (N.W.T.) into the Agency, and (2) consider removal of the kilo cutback for over production. Neither of these items were resolved. A change in provincial regulation eliminated the 5000 kilogram sleeve on over production.

Nova Scotia Fruit Growers Association - Several meetings were held with the Nova Scotia Fruit Growers Association over the request to hold a second plebiscite. The vote held on May 19, 1989 resulted in 58.6 per cent in favour and 41.4 per cent against the proposed plan. Council held a public hearing to determine eligibility of some producers. A national apple plan was being studied by the Nova Scotia apple industry by year's end.

Nova Scotia Potato Marketing Board - Council approved marketing license regulations. Under the Price Advisory Committee consisting of producers, packers, wholesale and retail, weekly minimum f.o.b. prices to packers were set. 1990 is the second year for this committee to act in this capacity. The Council Chairman acts as independent chairman on this committee. The price committee for processing potatoes continued to work independently and settled a satisfactory late season price with producers.

Nova Scotia Pork Producers Marketing Board - Council approved the amalgamation of the Board with the Pork Producers Association of Nova Scotia. The new organization, known as "Pork Nova Scotia", was to mount an aggressive identity program in the new year. Amendments were also made to the Plan in order to reduce the number of shipping clubs from five to three and to redefine the meaning of a producer.

Nova Scotia Grain Marketing Board - Since amending the Plan to include spring wheat, the Grain Marketing Board has functioned very smoothly. Council will miss the current Secretary-Manager, George Burris, who has announced his resignation.

Nova Scotia Wool Marketing Board - Discussion continued on the amalgamation of the Sheep Producers Association and the Nova Scotia Wool Marketing Board.

Nova Scotia Pea and Bean Growers Marketing Board - Council's involvement was setting the price for the 1990 pea crop. The bean price was settled by the Negotiating Committee.

Nova Scotia Flue-Cured Tobacco Marketing Board - Concern continued over the decline in grower numbers and acreage.

Nova Scotia Greenhouse Vegetable Marketing Board - The new board worked on formulating regulations regarding pricing and licensing as well as developing better communication among its members.

Nova Scotia Evening Primrose Marketing Board - Inactivity by the Board gave Council concern over whether or not the Plan should be revoked. A decision is expected in the new year.

MARKET DEVELOPMENT

Livestock

R. P. FOOTE, P.AG.
Marketing Specialist

PROGRAM REVIEW:

The projects and programs recorded in part reflect activities undertaken in food marketing, with a primary focus on red meats, poultry, dairy products, livestock marketing and markets information.

This office continued to act as budget manager for the Hog Transportation Policy. Secretariat Services continued to the EDP Liaison Committee and the Inspected Meat Plants Association of Nova Scotia. In addition, this office retained the role as Secretary and Advisor to the Dairy Cattle Sales Society. This office also served as a resource for the Meat Inspection Advisory Committee of the N. S. Meat Inspection Act.

Requests for information, material and/or advisory assistance continues to broaden in scope and range as agriculture diversifies. Department personnel, industry trade associations, interdepartmental groups and committees on a provincial and interprovincial basis are seeking markets information to access funding from federal, provincial and municipal programs.

CLIENT SERVICES:

Specific market assessments and profiles were undertaken for industry and other agencies during the year. The range and scope of management information developed by this office would be sadly curtailed were it not for the support of Elinor Maher, Sharon MacLean and Claire Hanlon (casual term). Over the review period the following activities or reports were undertaken:

- Ad track commodity features series was released quarterly with a 1989 annual.
- The fourth annual Live Swine Administrative Review was completed.
- Non traditional poultry and game market demand surveys were completed for retail and foodservice.
- Price and volume chart series were released quarterly with a 1989 annual.
- Assisted consumer questionnaire survey development regarding beef, lamb, pork and direct markets.
- Dairy goat milk market assessments were completed for several groups and agencies.
- Updates of agrifood exports of Nova Scotia origin to all countries for '87 and '88 are under preparation by product and value.
- An assessment of organic foods market potential on the range of products were developed.

- Fish offal supplies - A survey was undertaken of fish plant operators and fur producers for the Nova Scotia Fur Institute on the availability, price and interest in fish offal as an opportunity feed for fur ranchers.

- Chicken supplies and pricing in the province were monitored for Canadian Chicken Marketing Agency. This involves regular contact with foodservice and retail accounts, plus compiling advertising and promotional activities involving chicken.
- Participated in a survey by the Lawrencetown Livestock Sale concerning its overall operating efficiency and to identify areas that would improve its service to the buyer and seller.
- Bangladesh CIDA Project - Provided a review of price discovery mechanisms for farm commodities in Nova Scotia for this project of DPA Consultants, Halifax.

MARKET EDUCATION AND EXTENSION:

This office co-operated with diverse personnel and agencies to assist in the dissemination of agrifood information. These included:

- presentation at the semi-annual meeting of Sheep Producers Assn. in April 1989

- a media tour for press and radio commentators of potato packing, farm and demonstration plots in the Kentville area in July
- Economics and Business class tour of Larsens Meat Packers in October
- slides and script information to AMSDAV Conference on farm in Atlantic Canada, delivered in Airdrie, Alberta by Peter Rogers, N.B. Agriculture
- Direct Marketing Challenges '90 Conference, March 1990

AUDIO VISUAL AND EXHIBIT MATERIALS - Developed for Branch and client use in 1989, slides, charts, graphs and tables in co-operation with other Branch members.

INFORMATION RADIO RELEASES - Releases on livestock and meat product topics and information on work trips were scripted and produced in co-operation with the Audio Visual section.

LIVESTOCK MARKET REPORT - Supervised the Branch-sponsored weekly radio livestock price information program which continues to be produced by Frank MacDonald, Truro. This program is released via Nova Scotia Government Services and carried as a public service on the majority of Nova Scotia radio stations (excluding C.B.C.).

STAFFING DEPARTMENT EXHIBITS - Staffed Branch exhibits for Harvest Food Fest, Truro, and at the Atlantic Winter Fair.

PROFESSIONAL DEVELOPMENT:

Computer Learning Workshops, IRA Annual Convention, New Orleans -I have always been impressed with the long term potential of computer supported learning resources as a source of information to the agrifood community. The remote bulletin board service, initiated by the Branch, is a prime example of a

information within the agrifood community. Two computer based technologies, computer assisted instruction (CAI) and computer managed instructions (CMI) will be incorporated in RBBS educational programs by Marketing Services.

Diploma in Adult Education, St. F.X. - This office has now completed 30 of 36 credit hours toward this Diploma, as of July '89. A practicum based on adoption of the RBBS by the agrifood community is envisaged, with completion by July '90.

WORKTRIPS:

Trade to Island States Seminar, Moncton, May '89 -
This seminar was sponsored by the International Trade Centre, Industry, Science and Technology Canada and the Department of External Affairs. It reported on the results of a series of surveys to identify niche markets for the export of goods and services from Atlantic Canada through air and seaport facilities to Greenland, Iceland, the Windward and Leeward Islands and the main Caribbean centres.

National Foods Expo East, Philadelphia, Sept. '89 -
The program consisted of educational seminars, idea workshops and store tours in conjunction with an industry trade show with 450 exhibitors. Reports were prepared and distributed to several working committees.

Meat Processing Technical Mission, Germany, October '89 -
This project of the Inspected Meat Plants of Nova Scotia investigated abattoir and meat processing technologies suitable for adoption by member plants in Nova Scotia. West Germany was selected because the country is acknowledged as the leader in technology in processed meat product preparation and packaging. A resource library has been created from materials and contacts obtained during the mission. Summaries of information obtained were circulated to the provincial plant operators.

Marketing to the 1990's, Charlottetown, November '89 -
This conference presented a series of regional and international speakers and focused on market responsive production decisions at the farm level. Opportunities in branded agricultural food products, export breeding stock sales for cattle and swine and the development of an organic processed food industry were presented.

1990's Beef Development Seminar, Saskatoon, January '90 - I.M.P.A.N.S. attended this seminar to help it identify where the Nova Scotia beef producer and processor will fit in meeting the needs of tomorrow's beef markets. Significant changes are taking place in the slaughter industry with an emerging demand for specification feeder and fed cattle. Attendance at this seminar provided information that has been transferred to I.M.P.A.N.S. representatives and the industry.

70th Canadian Meat Council
Toronto, February 1990
This conference is bracketed by pre-conference Society and Committee meetings relating to issues facing the meat sector. This office was able to participate in industry government meetings regarding beef grading and the Canadian Meat Science Association Symposium on the science and politics of animal welfare.

Theme speakers to the Conference proper focused on the maturing Canadian market, noting by the year 2035 over half of Canadians will be 50+. Research has shown that older adults have reduced brand recognition as sight and ability to distinguish colours fail; further, they have difficulty in opening several types of packaging--all issues that will impact on a food's acceptance. Dr. Furlini Bertuch challenged the Conference attendees that 'the future is now'. He noted immigration to Canada will bring with it food, taste and preferences that will represent the only expanding market segment in Canada. This is due to an essentially static population growth. Summaries and reports have been filed with various groups and agencies on the meetings and its proceedings.

Canadian Livestock Market Information Advisory Committee
Toronto, February 1990
Provided a regional report to Committee members on provincial initiatives to improve markets and management information through the RBBS. Served as a resource person to I. P. Sharp on its presentation to Committee members regarding the potential for a user friendly agricultural stats data base.

The completeness and comparability of price data generated and reported throughout Canada continues to be a central issue. This is in particular a concern in the wholesale boxed beef area as no headway has been made in the three years to implement a reporting system.

Fox Nova Scotia Project, Toronto, February '90
In support of the Fur Market Research Project, this office attended the February Fur Sale. This facilitated interviews with buyers and producers from North America in attendance. Meetings and interviews were also held with fur retail and garment manufacturers in the fashion district of Toronto. Reports have been filed with the consultant and Fox Nova Scotia.

AD TRACK SERIES:

The Marketing and Economics Branch continues to monitor retail food store ads. Commencing with the second quarter of 1989 the summary was revised to track stores in Truro, versus Truro and Halifax. The concentration of store ownership and store closures resulted in dramatic changes in advertising strategies in Metro Halifax/Dartmouth and the ability to track non-print advertising and its content. The new series consists of tracking the type of print advertising, the total ad items, the total meat items and selected primary and secondary features for fresh pork, turkey and lamb. Stores included in the survey are Sobeys, Co-op, Cavanaghs, I.G.A. and Save Easy.

TABLE I
TOTAL AD ITEMS PER QUARTER

	2ND 1989	3RD 1989	4TH 1989	1ST 1990
SOBEYS	765	1556	1681	1685
CO-OP	239	393	519	485
CAVANAGHS	293	377	388	381
RYANS IGA	972	1305	1228	979
SAVE EASY	940	1407	1406	1228

TABLE II
TOTAL MEAT ITEMS PER QUARTER

	2ND 1989	3RD 1989	4TH 1989	1ST 1990
SOBEYS	177	85	216	272
CO-OP	56	22	129	109
CAVANAGHS	89	9	121	132
RYANS IGA	162	34	175	148
SAVE EASY	155	24	282	316

TABLE III
 # OF FRESH PORK FEATURES

	2ND 1989	3RD 1989	4TH 1989	1ST 1990
SOBEYS	27	30	17	24
CO-OP	5	7	3	5
CAVANAGHS	3	3	3	7
RYANS IGA	19	11	17	15
SAVE EASY	17	19	12	15
TOTALS	71	70	52	66

TABLE IV
 # OF CHICKEN FEATURES

	2ND 1989	3RD 1989	4TH 1989	1ST 1990
SOBEYS	20	35	25	18
CO-OP	4	11	9	10
CAVANAGHS	6	5	2	8
RYANS IGA	9	9	8	9
SAVE EASY	11	3	7	4
TOTALS	50	63	51	49

TABLE V
OF TURKEY FEATURES

	2ND 1989	3RD 1989	4TH 1989	1ST 1990
SOBEYS	8	13	12	9
CO-OP	1	3	6	1
CAVANAGHS	2	1	7	2
RYANS IGA	5	12	16	2
SAVE EASY	0	2	12	3
TOTALS	16	31	53	17

TABLE VI
OF LAMB FEATURES

	2ND 1989	3RD 1989	4TH 1989	1ST 1990
SOBEYS	5	7	8	7
CO-OP	0	1	0	4
CAVANAGHS	0	0	0	0
RYANS IGA	2	2	1	2
SAVE EASY	0	0	0	0
TOTALS	7	10	9	13

DATA BASES/MARKET GRAPH SERIES:

During 1989/90 data bases were maintained for the following information and allowed for quarterly and annual reports tracking market information focusing on prices and volumes for hogs, sheep and cattle. This series is circulated to key Department and industry personnel.

1. Weekly Rail Grade A1/2 Steer bids, Calgary, Toronto & Truro
2. A1/2 Slaughter Steer Prices, Toronto & Truro
3. A1/2 Slaughter Heifer Prices, Toronto & Truro
4. Weekly Live Price 95 lbs.+ lamb, Calgary, Toronto & Truro
5. Weekly Lamb Volume, Truro
6. Weekly Feeder Steer Prices, 700+, Edmonton, Toronto & Truro
7. Weekly Feeder Steer Prices, 500+, Edmonton, Toronto & Truro
8. Weekly Feeder Steer Prices, 400+, Edmonton, Toronto & Truro
9. Weekly Wholesale Beef/Steer Carcass Prices A1/2, Montreal, Calgary and Atlantic
10. Cash Hog Prices, Index 100, Alberta, Ontario and Omaha
11. Weekly Choice Slaughter Steer Prices, Oklahoma & Toronto

12. Weekly D1/2 Slaughter Cow Prices, Edmonton, Toronto & Truro
13. Weekly D3 Slaughter Cow Prices, Edmonton, Toronto & Truro
14. Weekly Wholesale Dressed D1 prices, Montreal, Toronto & Atlantic
15. Veal Calves Volume Weekly numbers and prices, Truro
16. Atlantic Volumes Inspected Slaughter, N.S. origin, for cattle, calves, swine and lamb on a weekly basis
17. Weekly Canadian Processed Egg Production, volume of total liquid break, whole egg and sold as liquid
19. Cattle Volume, Maritime Cattle Market

RBBS-PC:

The Remote Bulletin Board Service is in its second year and is meeting its goal of improving the timeliness of markets information to the agrifood community in Nova Scotia. The agrifood project has provided, at a greatly reduced cost, public access to the RBBS. Marketing Services continues to maintain that access and usage are critical to the establishment of the legitimacy of the RBBS as a price and volume source. It appears acceptance of the remote bulletin board service rests with broader demonstrations to the agrifood community and Extension staff. It is possible an expanded markets information project may be the most expeditious approach to establish a series of demonstration labs throughout the province. By this method, professional and secretarial support staff could be trained in the use of the system and them demonstrate it to farm clientele as they visit the regional offices in the normal course of their business.

PROCESSOR-DISTRIBUTOR-RETAIL CONTACT:

Contact was maintained with a cross-section of general management, sales and production personnel at red and poultry meat processor and distributor level in Atlantic Canada.

With retail consolidation and centralized buying programs dominating the retail scene, this office maintains ongoing contact with the head office staff of Sobeys, Co-op Atlantic, Atlantic Wholesalers, Bolands I.G.A., and subsidiaries.

LIVESTOCK AUCTIONS:

- Maritime Cattle Market
- Hants Livestock Sales (closed during 1989)
- Lawrencetown Federation Sale
- Sussex Stud Home

The Maritime Cattle Market continues to perform a valuable service for the livestock industry. Although 90% of the red brand beef is purchased by private treaty, the clearing house function is essential for all classes. The two small provincial sale barns and the many specialized sales provide essential services for those producers who utilize them. Private treaty sales are on the increase. This has a negative impact on price discovery and full market reporting.

MARITIME CATTLE MARKET CATTLE & CALF VOLUME SUMMARY
NUMBER OF HEAD (BY TYPE)

YEAR	TOTAL OF CATTLE/CALVES	STEERS & HEIFERS	SLAUGHTER COWS	SLAUGHTER BULLS	SLAUGHTER VEAL	BOB CALVES	FEEDERS	DAIRY REPLACEMENTS
1984	21,839	1025	2972	264	1967	7628	5816	2167
1985	24,759	1231	3721	231	1982	8510	6688	2396
1986	28,790	1106	3510	246	2010	11373	7928	2617
1987	29,941	931	3777	203	2122	10640	9024	3244
1988	27,286	800	2825	277	2568	11199	7225	2392
1989	25,970	613	2099	185	2475	11717	6511	2370

INTERGOVERNMENTAL LIAISON:

This office continues to interact on a request and enquiry basis with a series of federal and provincial agencies. This work includes consultant services to regulatory and funding agencies.

NOVA SCOTIA HOG TRANSPORTATION POLICY:

Provincial shipments were up 5% but the county to county performance was uneven. The following summary profiles the results.

HOG SHIPPING CLUB RESULTS BY COUNTY

COUNTY	1987/88 COUNTY VOLUME	1989/90 COUNTY VOLUME	% CHANGE
ANTIGONISH	5908	6542	+10%
PICTOU	4725	4198	-11%
COLCHESTER	17345	17891	+ 3%
CUMBERLAND	8685	10495	+21%
HALIFAX	569	684	+20%
HANTS	8943	8723	- 4%
KINGS	136643	145491	- 6%
ANNAPOLIS	13735	12787	- 7%
DIGBY	32053	33687	+ 5%
LUNENBURG	4784	5027	+ 5%
TOTALS	233390	245525	OVERALL +5%

AFDA MARKET DEVELOPMENT:

The demand on time to assist clients in completing applications and subsequent Project Supervision has resulted in additional strain on available time.

The volume of inquiries continues to grow. The volume and range of inquiries continues to grow.

Fruits and Vegetables

Peter J. Rideout, P.Ag.
Marketing Specialist (Horticultural Crops)

ABSTRACT

Program activities in the direct marketing sector formed a large part of the work of the Kentville office, Marketing Services Branch in 1989/90. In co-operation with other Department staff, we provided consulting services on business expansion to a large number of the province's direct marketing operations and participated in the organizing and staging of the successful Direct Marketing Challenges '90 Conference.

The office continues to expand its marketing advisory services to the various sectors of the province's horticulture industry with particular emphasis in the major wild blueberry, tree fruit and vegetable sectors. Most program activities are directed through the various commodity organizations although there is increasing demand for more sophisticated marketing advisory services to individual growers and marketing organizations.

In the area of professional development and upgrading, we attended the Post-Harvest Technology Short Course at the University of California, Davis in June 1989. The course and subsequent field trip further enhanced our knowledge in post-harvest handling of fresh produce and greatly increased our contacts in the extension marketing and post-harvest technology fields.

MARKET DEVELOPMENT

Extension

Consulting services with individuals, firms and organizations are the foundation of our marketing extension work with the province's horticulture industry. Activities range from quick, short-term responses to specific market opportunity or sales inquiries to on-going involvement with marketing organizations, as well as individual growers and shippers.

We continue to work closely with the province's tree fruit industry. In a new initiative we began publication of a weekly Tree Fruit Market Update bulletin in the fall of 1989 with a total of 12 issues circulated to over 60 growers, packers and others. The bulletin includes market news from major fruit growing areas, and an overview of local market activity based on a weekly packer survey. We continued our on-going consultations with Scotian Gold Co-operative as the firm progresses in its re-structuring and consolidation. A marketing co-ordinator was hired for a period under an AFDA-assisted project and considerable planning and discussion through summer and fall led to purchase and installation of a sophisticated new packing line in March 1990.

Several meetings were held leading to the establishment of Eastcoast Apples Ltd., a marketing venture combining the sales activities of Gordon Lemmon's LPR Marketing and Paul & Peter Elderkin's Wolfville Fruit Co.

Several AFDA-assisted Physical Infrastructure projects were completed in 1989 under the tree fruit sector, including Mawson Baltzer - packing facility and equipment and Frank Porter -apple cold storage facility.

The vegetable industry continues to expand and we worked closely with Kings Produce Ltd. throughout the fall and winter in the planning phase of a new marketing facility for this active organization. The company also acquired E.B. Allen Foods, Middleton in 1989 and operates it as a separate Kings Processing Ltd. division, producing coleslaw and a line of fresh prepared salads.

The optimism of the vegetable sector was seen in the good number of individual crop-planning consultations held during the winter months with new or expanding growers.

Riverbrook Farms (Greg & Claudia Coldwell), Port Williams, were in planning for expanding their encouraging spinach marketing program in 1990 and we assisted in organizing investigative travel to the U.K., Holland and New England in that regard.

Direct marketing of farm produce to consumers is one of the most dynamic and creative sectors of the province's agricultural industry. Roadside markets are becoming increasingly diverse and sophisticated among the larger operations and a number of growers have shown an interest in setting up new facilities. We provided consultative advice relating to renovation and expansion at some of the province's best-known market operations in 1989-90, including:

Scotian Gold Coldbrook	- interior/exterior renovation, garden centre expansion & upgrading
Henniqar's Farm Market Greenwich	- major expansion, new product lines, new marketing strategy
Appleberry Farm Market Bridgewater	- bedding plant/garden centre sales area expansion & upgrading
Doyle's Farm Market Kentville	- new facility design
Franklin's Farm Market North River	- design input, new facility
Chute's U-Pick & Farm Market - Port Williams	- design input
Cameron's Farm Market Hantsport	- renovations
W.J. Kenny Farms Wolfville	- farm market expansion and renovation

Most of these activities led to project proposals under the AFDA Market Development Program. Considerable staff time was spent in working with clients on an individual basis and an interesting side-benefit is the amount

of professional experience generated for both Extension Engineering staff and ourselves in working with these projects.

A major extension activity in 1989/90 involved the planning and staging of the Direct Marketing Challenges '90 conference held in Halifax, March 25-27. Modeled on the format of previous general marketing conferences, DMC'90 was the first of this type to focus specifically on the direct marketing sector. Some 115 marketers attended plenary and concurrent sessions with speakers on such topics as: "marketing rural life", produce merchandising, post-harvest technology and bedding plant/nursery stock care and merchandising. Excellent evaluations were received, indicating strong interest in future conferences of this type.

We participated in a number of short courses and seminars in 1989 including a Bedding Plant Production short course at NSAC, speaking on Developing a Marketing Strategy. In addition, we delivered lectures at two separate Technical University of Nova Scotia seminars; Refrigeration in the Food Industry and Transportation of Fresh and Frozen Foods, on the topic of marketing, care and handling of local fresh produce.

The highlight of our extension-related activities in 1989 was in the area of professional development. We attended the Post-Harvest Technology Short Course and Field Trip at the University of California, Davis, in June, under an AFDA Human Resource Development project. Inadequacies in post-harvest handling have been identified as major constraints to future development of the province's fresh produce industry and staff upgrading in this specialty is seen as enabling improved service to our increasingly sophisticated clientele. The UC Davis short course was an intensive week of lectures and labs attended by 75 research and extension professionals from around the world, providing a forum for detailed discussion on the widest array of fresh commodities. The week-long field trip included some 30 visits to produce operations throughout California's Central and Salinas valleys.

Market Information

The Kentville office continues to publish the weekly Fresh Produce Supply Forecast in season. The bulletin is intended to inform the wholesale and retail trade and the media of the local produce supply situation and crop outlook. In 1989, circulation was expanded to include some 60 restaurant and hotel members of the Taste of Nova Scotia program. A total of 13 issues were published, with a weekly circulation of 250.

A new project, related to the Supply Forecast, was our participation in a weekly "Produce Panel" on CBC's "Maritime Noon" program, talking about "what's new in local delicacies this week". This was a very interesting exercise from which we gleaned a good amount of positive feedback. Other members of the panel included Neri Vautour, our counterpart with N.B. Agriculture and Tom Cuzak of the P.E.I. Federation of Agriculture.

The daily-updated "Market Line" information service was once again operated from the Kentville office, under the direct management of summer assistant Kim Pinch. The service sees steady, moderate use, with up to 30 calls/day received during peak season and generally positive remarks on the quality of the information provided on fresh produce markets around the country and in the U.S. During her term with us, Ms. Pinch also assisted in conducting interviews relating to the 1989 Direct Marketing Survey, under the supervision of Market Research Analyst, Shelley Manning.

Organizations

The majority of our work in the wild blueberry industry, which accounts for as much as one-third of staff time annually, is directed through the Wild Blueberry Association of North America (WBANA) and the Blueberry Producers Association of Nova Scotia (BPANS). We serve as editor of the WBANA quarterly newsletter and in that capacity, as chairman of the Communications Committee. We also sit on the Canadian Domestic Promotion Committee and co-ordinate domestic trade show exhibits for the organization. In addition, we serve as an alternate member of the Overseas Promotion Committee. WBANA is very active on many fronts including promotion of wild blueberries around the world, supporting research and development and is currently undergoing a detailed long range planning exercise. The association's most important function, however, continues to be the forum for communication and co-operation it provides to the industry. BPANS, for its part, is an active promoter of wild blueberries within the province and is a strong supporter of WBANA activities nationally and internationally.

The Nova Scotia Fruit Growers Association is also active on many fronts, perhaps in contrast to low profitability and low morale in the tree fruit industry in general. Two attempts have been made to implement a provincial marketing plan for apples in as many years, both of which were narrowly defeated after bitter, acrimonious campaigns were waged. Currently, a national apple marketing agency is being proposed, through Canadian Horticultural Council, with public hearings expected to be held by the National Farm Products Marketing Council in the summer of 1990. The NSFGA commissioned a market study in 1989 which showed opportunities for marketing Gravenstein apples in Ontario and a marketing program is being put in place to enter that market in the fall of 1990. The association's secretary-manager, Suzanne Corkum resigned in the spring of 1990 to pursue her interest in wine production full-time. Mrs. Corkum's position has been taken over by Janice Lutz.

The Vegetable and Potato Producers Association (VPPA) actively promotes the province's vegetable industry in spite of modest financial resources. The VPPA supports federal and provincial variety trials work and other research, supports new technology projects in the vegetable industry and is involved in product promotion activities in the marketplace. With AFDA assistance, the association purchased a professional-quality exhibit system in 1990 for future trade shows and other promotions. The VPPA annual general meeting in January 1990 was one of the most positive and best-attended we have seen in recent years, an indication, we believe, of optimism in the future growth and development of this promising industry.

The Strawberry Growers Association of Nova Scotia (SGANS) promotes the development of the province's strawberry industry and the increased consumption of its produce. The association, through promotional consultant Bela Casson was represented at a number of consumer food shows and exhibitions as well as conducting in-store demonstrations of both fresh and frozen strawberries. Food safety and environmental concerns have been at the top of the produce industry's agenda in the past year and the SGANS annual meeting in January focused on this timely issue. The strawberry industry continues to be almost totally a short-season, summer crop business. One or two growers are experimenting with everbearing varieties with some encouraging results. "Waiting bed" production methods being evaluated at the Kentville Research Station may also lead to more extended season availability.

The Farm Fresh Marketing Association represents the province's pick-your-own and roadside stand operators and conducts consumer information and promotion programs on their behalf. Membership has been fairly constant between 50 and 60 operations in recent years. Farm Fresh employs a summer student who co-ordinates the heavily-used weekly newspaper listings and updates the daily "Harvest Line" information, which the Marketing Services Branch assists with consultative and financial resources. The Farm Fresh board of directors has been given a mandate to explore new areas of activity in 1990 to further develop the direct marketing sector and this office expects to be actively involved in that process.

Meetings of the Highbush Blueberry Growers and the raspberry growers were both held in March 1990, co-ordinated by extension and research staff in an effort to stimulate more activity by these groups. We presented market outlook talks at both of these sessions. Highbush blueberries show continued potential on the fall market in New England, in spite of increasing plantings in other areas. That market is currently served by one Nova Scotia grower and lack of volume and marketing co-ordination have been the main barriers to entry by other, smaller growers.

Increased raspberry production in Nova Scotia for the wholesale market is limited by lack of good "shippable" varieties, coupled with inadequate post-harvest quality control. The Raspberry Growers Association was re-activated at the March meeting and it is hoped this organization can serve as a catalyst in addressing these constraints.

The Greenhouse Growers Association of Nova Scotia has an active program promoting the wide range of greenhouse floral and vegetable crops produced in the province. The Greenhouse Vegetable Growers Marketing Board, formed under the association's auspices in 1988, has not, to date, been active in the marketing process for greenhouse vegetables, although a pricing committee was being established in the spring of 1990 for this purpose. This office provides on-going liaison with the greenhouse growers groups, including the review of several AFDA Market Development Program proposals in the past year.

Bedding plant and nursery sales continue to show healthy growth as the level of interest in both residential and commercial landscaping steadily rises. This office, in co-operation with the greenhouse horticulturists provides consultative marketing services to this industry on an on-going basis. Worthy of mention are the expansions undertaken in the bedding plant/nursery line in the past year by such operations as Browns' Pine View Farm, and Miles Lake Farm Market in Bridgewater, Springvale Farms, Berwick and Atlantic Gardens/Nurseries, Bedford and Moncton, N.B.

The Canadian Produce Marketing Association (CPMA), (formerly Canadian Fruit Wholesalers) and the Atlantic Fresh Produce Association (AFPA) are this office's main links to the wholesale and retail produce trade.

The AFPA, largely through the efforts of several key wholesale members, has been working toward representing the region's entire produce industry and in this vein, has attempted to work more closely with the leading grower organizations. The AFPA has also encouraged more direct grower/shipper involvement in its activities to the extent that a new directors' structure being considered will have equal numbers of growers, wholesale and retail representatives.

We attended the CPMA Convention and Trade Show in Montreal in February, which included operating an exhibit in the trade show. The CPMA represents Canada's entire produce marketing industry and its annual convention provides a unique opportunity to make valuable marketing contacts. With our encouragement, a slowly increasing number of Nova Scotia producers and organizations are attending this annual event. Kings Produce Ltd. is perhaps the best example, this year venturing forth with their own trade show exhibit, with positive results and prospects for increased sales. As expected, food safety issues, most notably the Alar situation on apples and the Chilean grape incident, were high on the agenda and a number of session speakers highlighted the need for continued vigilance in this area, to ensure the future growth of fresh produce consumption.

The Farm Organizations Joint Services Society, established with this Department's co-ordination in the mid-1980's, provides management services to six member organizations from its offices in Blair House, Kentville Research Station. The member groups include:

Nova Scotia Fruit Growers Association

Vegetable & Potato Producers Association

Farm Fresh Marketing Association

N.S. Potato Marketing Board

N.S. Processing Pea & Bean Growers Marketing Board

N.S. Tobacco Growers Marketing Board

Under the capable management of Sonya MacKillop the office is extremely active in a wide range of areas of responsibility on behalf of its members. An AFDA-assisted project in 1989/90 provided the office with a new computer system to further upgrade the operations. We continue to serve as an ex-officio member of the Joint Services board of directors.

Foodservice

Linda D. MacDonald, M.Sc., P.Dt.
Marketing Specialist

I INTRODUCTION

The report to follow outlines the major initiatives and program activities in the area of foodservice marketing from April 1, 1989 to March 31, 1990.

The primary objective of programming is to increase the awareness and consumption of Nova Scotia food products within the foodservice sector. General responsibilities include:

1. Monitoring and assessment of the Nova Scotia foodservice market through:

   - consumption trends and sales patterns.
   - evaluation of purchasing behaviors.
   - awareness and consumption of Nova Scotia agri-food products.
   - documentation of market problems and constraints with respect to foodservice.

2. Increasing awareness and enhancing the image of Nova Scotia agri-food products within the Nova Scotia foodservice market.

3. Promotion of Nova Scotia agri-food products with significant market potential in foodservice.

4. Development and marketing of specific Nova Scotia agri-food products (branded/generic) with market replacement and expansion potential within the foodservice industry.

Program activities most closely aligned with the foregoing responsibilities are:

(a) Educating foodservice operators, processors, distributors and producers (commodity groups/association marketing boards);
(b) Marketing agri-food products through programs of advertising, promotion, public relations and market development within the foodservice sector;
(c) Assisting Nova Scotia agri-food producers/processors by providing marketing services with respect to foodservice.

II NOVA SCOTIA'S FOODSERVICE INDUSTRY

Canadian studies show that anywhere from 33 to 39 percent of the food dollar is now spent in foodservice establishments. This away-from-home food market has experienced tremendous growth (40%) over the past five years.

Nova Scotians eat out somewhat less than other Canadians; we are at 86 percent of the Canadian average. Nova Scotians will spend almost 450 million dollars in restaurants in 1990.

Food purchases by the foodservice industry in this province are currently estimated to be approximately 235 million dollars annually. Commercial establishments comprise the bulk of these purchases (75%) with institutional foodservice taking the remaining (25%).

Food costs, as a percent of total operating expenses, generally run operators anywhere from 10 to 45 percent - depending on the size, type and efficiency of the operation. Most of these food purchases are made through middlemen (wholesalers/brokers), although in many rural areas, small operators can make up to two thirds of their purchases at retail locations near-by.

III REPORT OF PROGRAM ACTIVITIES

A. Liaison

1. Contacts

Initiating and maintaining contact with individuals and groups in the agriculture, food and foodservice industries of this province is key to program development efforts targeted to the foodservice sector.

In order to gain knowledge and technical expertise relating to the products and capabilities of Nova Scotia's food and agricultural industry, the following contacts were maintained over the past year: producer associations, organizations and boards; meat and poultry processors/-wholesalers; fruit and vegetable processors/wholesalers; dairies; other producers and packers of Nova Scotia food commodities.

On-going contact with foodservice establishments in the province is important, so that purchasing practices and policies, food product specifications, as well as preparation and packaging requirements can continue to be monitored. A working knowledge of the foodservice market was obtained through meeting and consulting with representatives of the foodservice industry as well as government departments, agencies, organizations and associations affiliated with this industry.

Among those contacted in 1989-90 were: Nova Scotia Departments of Health and Fitness, Tourism and Culture and Fisheries; Nova Scotia Restaurant and Foodservices Association; Nova Scotia Chefs Association; Canadian Food Service Executives Association (Halifax/Dartmouth Branch) (Northumberland Branch); Nova Scotia Dietetic Association; Nova Scotia Purchasing Agency; Tourism Industry Association of Nova Scotia; Tourism and Hospitality Institute of Nova Scotia; individual foodservice managers of restaurants, hospitals, homes for special care and other institutional foodservice operations.

2. Presentations and Reports

During 1989-90, a number of seminars, workshops and meetings were attended where presentations were given. Included are:

- Wholesaler/Processor Seminar, "The Taste of Nova Scotia Program and Marketing Opportunities for the Agri-Food Sector". (July 6, '89)

- Federal Provincial Market Development Council "The Taste of Nova Scotia" Program. (Oct. 3, '89)

- Extension Services, "The Taste of Nova Scotia" Program. (Oct. 3, '89)

- Cape Breton Region, Nova Scotia Dietetic Association, "Nova Scotia's Agri-Food Sector - What's in it for You?" (Nov. 16, '89)
- Nova Scotia Restaurant and Foodservices Association "What's New in '89". (Nov., '89)

- Mount St. Vincent University, Dept. Home Economics, "Program Development and Evaluation - The Process and Application". (Nov. 23 & 30, '89)

- Canadian Food Service Executives Association, Northumberland Region, "Cultural Influence on Food Demands". (Nov. 28 '89)

- NSDAM Staff Conference, "The Taste of Nova Scotia Program".(Jan. 11 '90)

- Strawberry Growers Association of Nova Scotia, "The Taste of Nova Scotia Program". (Jan. 23, '90)

- Consumer and Corporate Affairs, Round table session on Nutrition Labelling. (March 29 '90)

- Maple Producers Association of Nova Scotia Annual Meeting, "Magic Maple Weekend Foodservice Proposal". (presented by Bela Casson, May, '89)

- Blueberry Producers Association of Nova Scotia, "Out of the Blue" Foodservice Report". (presented by L. Thompson, Nov. 24, '89)

- Canadian Meat Council, N.S. Meat Month Project Report '89. (presented by Mary Wiley, CMC, Feb. 1, '90)

3. Professional Liaison

- Corresponding Member, Nova Scotia Nutrition Council.

- Nutrition Committee Member, Canadian Dietetic Association.

- NSDAM Representative, Board of Directors, Milk Nova Scotia.

- NSDAM Representative, Co-ordinating Committee Member, Nova Scotia Heart Health Program. (N.S. Dept. Health & Fitness)

- NSDAM Representative, Taste of Nova Scotia Council.

- Member, Canadian Heart Foundation McBain Committee.

- Member, N.S. Heart Foundation Restaurant Program Committee. ("Heart Smart")

B. Consultation

During 1989-'90, this office responded to numerous requests for information. Topics were wide ranging: market and commodity information; source of supply; foodservice establishment listings; foodservice and agricultural statistics; food product specifications; program planning and evaluation; survey design; technical information on food, nutrition, consumption patterns; information on funding sources; assistance with applications and interpretation of guidelines (AFDA, MAP). Those contacting this

office included individual producers; producer associations and boards; private sector agri-food firms; marketing and public relations firms; commodity promotion specialists; NSDAM staff; other government departments; foodservice industry representatives; wholesalers/ brokers.

C. Promotion and Education

1. Publications and Other Resources

In 1989-90, Marketing and Economics Services published a number of resources to complement promotion and market development activities with respect to foodservice. In many cases these materials were a collaborative effort (i.e. graphic design, photography, recipe development/ testing). The work and input by AV Services, contract casual Home Economists and Commodity Promotion Specialists is gratefully acknowledged. "Food For Thought - A Buyers Guide To Nova Scotia Food Products", 2nd edition, 1989. This popular resource contains a comprehensive listing of Nova Scotia food producers and processors together with contact, source of supply and product specification information.

"Lambtastic - Discover Nova Scotia Lamb". The second foodservice recipe flyer highlighting the versatility of Nova Scotia lamb.

"Taste of Nova Scotia" - An array of support collateral (stickers, invitations, logo repro sheets, etc.) as well as major input (copy, recipes, graphics) to the "Taste of Nova Scotia" Guidebook were among NSDAM'S contribution to the program.

The production of support materials to complement 1989-90 foodservice promotion programs included tent cards, menu clip-ons, buttons, recipe flyers/cards, information flyers/newsletters and order forms for material. Commodities represented included: red meat (beef, pork, lamb), strawberries, wild blueberries, maple, apples, eggs.

2. Photography/Food Styling

- Agri-food shot (NSDAM Booth and Ag Awareness Literature
- Strawberry photography (1990 foodservice campaign)
- Nova Scotia lamb photography (brochure)
- Apple/Pear (brochure/menu clip)

3. Foodservice Promotions

In concert with Nova Scotia Agri-Food Commodity Boards and Associations the following foodservice promotions were conducted or assisted with in 1989-90:

- "Taste of Nova Scotia" Program Launch (May '89)
- Acadian Days Pork Promotion (July '89)
- Nova Scotia Fresh Strawberry Promotion (July '89)
- Nova Scotia Fresh Wild Blueberry Promotion (Aug. '89)
- Nova Scotia Food Night (Department and "Taste N.S." display (Sept. '89)
- "Meat Me For Lunch" Canadian Meat Month Promotion (Feb.'90)

- "Put Pork on Your Fork" Wandlyn promotion (Feb.'90)
- Maple Magic Weekend (March/April '90)
- "Winning Ways With Eggs" Beaver Foods Promotion (March '90)

Project reports for the foregoing are available upon request.

4. APEX (March 3 - 6, 1990

As in previous years, Marketing Services co-ordinated the commodities representation at the largest foodservice trade show in Atlantic Canada. This year, the show was held in Moncton, with six Nova Scotia commodities represented. For the first time Nova Scotia agriculture had a booth of its own, promoting local sources of supply and commodities which were not represented.

5. Harvest Food Fest '89

In cooperation with Keddy's Truro Inn, Marketing Services planned and implemented a major food show in September '89. By all accounts the initiative was a huge success. Responsibilities included overall planning and co-ordination, NSDAM displays and the consumer testing component.

D. Market Development

1. Taste of Nova Scotia

In May of 1987, the Department of Agriculture and Marketing and the Department of Fisheries initiated discussions with the Department of Tourism and Culture regarding a co-ordinated food program targetted to the foodservice industry. In late May, 1988, the Government of Nova Scotia approved the establishment of the "Taste of Nova Scotia" program. The program proposes to position the province as a food destination by targetting the 1.5 million people who travel the province seeking a "Taste of Nova Scotia" - that is, our indigenous food products, wholesomely prepared and imaginatively presented.

Summer, 1989, was the charter membership year and the focus was to feature and promote member foodservice establishments which met specific service, hospitality and menu guidelines. A Government/Industry Council of eight members and a Program Manager are responsible for ensuring program credibility and effectiveness through inspections, local food product quality and quantity control and education program components.

The 61 foodservice "Taste of Nova Scotia" members were key to the successful implementation of the Program's first year of operation. They received marketing assistance through consultation, menu development activities, newsletters, guidebook, point-of-sale materials, source of supply information, government marketing and promotional activities. In return, members adhered to a rigorous set of standards and a committment to use local products.

The work of the Taste of Nova Scotia Council was undertaken by way of Committees - Finance, Marketing, Member Services, Membership, Long Range Planning. NSDAM played a leadership role in guiding the program and its resultant initiatives through the first year of operation. As well, the Branch provided much needed consultation in accessing suppliers of product, menu development and liaison with trade and commodity boards/ associations.

The "Taste of Nova Scotia" Program continues to be a comprehensive multi-disciplinary approach to marketing our local food products. It is industry driven with a large measure of involvement and support from the private sector.
Membership packages for agri-food and fisheries interests are currently being developed so that these industries may become involved in the program as sponsors and associate members.

An annual report outlining major marketing activities and initiatives will be presented at the Annual General Meeting in May '90. Highlighted will be:

(a) Participation in provincial, national and international food shows and events:

- Food Fair Atlantic/N.S. Apple Pie Cook-Off
- Yankee Cook-Off (Boston)
- Canadian Food & Beverage Show (Toronto)
- Sea Sell (U.S. Eastern Sea Board)
- APEX '90 (Moncton)
- Boston Wild Blueberry Promotion (WBANA)
- Britain Wild Blueberry Promotion (WBANA)
- "Taste of Nova Scotia" reception in conjunction with World Figure Skating Championship. (Halifax)

(b) Media and Trade Events:

- Media and Trade Launch of Program
- Wholesaler/Processor Seminar
- N.S. Food Night
- Dini Petty Show
- National/International Tourism Advertising and Associated media coverage of Program.

2. AFDA

Member of the AFDA Market Development Implementation Committee and project leader and/or assistance given to applicants in 1989-90 including: Elm Avenue Dairy; Milk Nova Scotia; Pork Nova Scotia; Albert Ripley (Maple Gift Pack); Williamsdale Winery; O.H. Armstrong Ltd.; Eastern Meat Purveyors Ltd.; Northern Harvest Frozen Foods Ltd.

3. Foodservice Study

In 1984, Price Waterhouse interviewed both demand and supply sides of the Nova Scotia foodservice sector. Based on interviews , the types of products used and opportunities for supplying these products was determined.

As the foodservice program has evolved, it has become apparent that more market oriented information was needed - specifically, information focusing on the critical determinants of buyer behavior in both the middlemen (wholesaler/broker) and end -user (foodservice) sectors. These data are necessary to the development of marketing strategies to assist the Nova Scotia Dept. of Agriculture and Marketing in addressing foodservice needs and demands.

Early in 1989, with assistance under the Agri-Food Development Agreement (AFDA), Peat Marwick Stevenson & Kellogg was contracted to undertake a market analysis of the N.S. foodservice industry. The report, which will be completed in May '90, will review the literature and assess the base-line situation, explore the attitudes and perceptions of distributors and foodservice end-users towards N.S. food products (focus groups) and with a survey questionnaire gather data pertaining to food purchase behavior and opportunities for local producers and processors.

3. Consumer Testing

In 1989, a consultant was contracted to assist Marketing Services in developing expertise in the area of consumer testing. Although the Branch has traditionally conducted consumer testing on a limited scale, there was a need to build on this program with resources, training and computer capability.

With assistance in data analyses by the Branch Market Researcher, the following products were tested and reports submitted:

- Cobi Foods, Apple Pear Sauce
- Wenham Farms, Day Neutral Strawberries
- TelderBerry Farm, Strawberry Wine
- Peninsula Farm, Frozen Yogourt
- Farmers Dairy, Frozen Yogourt/Ice Cream
- Scotsburn Dairy, Frozen Yogourt

E. Continuing Education

The following conferences, trade shows and seminars were attended in 1989-90:

- Program Development Workshop. (Truro, May 23-24, '89)
  (assisted in planning for commodity representatives prior to implementation of the Marketing Assistance Program (MAP).

- Heart Health - Developing Effective Strategies. (Halifax, May 25, '89)

- Canadian Association of Chefs de Cuisine Annual Conference.
  (Halifax, May 28 - June 3, '89)

- Modified Atmosphere Packaging Seminar. (Halifax, Oct. 4, '89)

- Public Relations Seminar. (Dartmouth, Oct. 18, '89)

- N.S. Dietetic Association Conference. (Wolfville, Oct. 27, 28, '89)

- National Meat Month. Safety of the Meat Supply Seminar.
  (NSAC, Feb. 9, '90) (coordinated seminar for meat industry, NSDAM staff)

- Canadian Food & Beverage Show. (Toronto, Feb. 18-21, '90)
  (represented WBANA at this show)

- Nutrition Labelling Seminar/Food & Drug Act - Proposed changes
  (Halifax, Feb. 1, '90)

- APEX '90 Trade Show. (Moncton, March 3-6, '90)

(coordinated commodity representation)
- Direct Marketing Conference (Halifax, March, '90)
(coordinated foodservice and hospitality arrangements including opening reception, luncheons, speakers' room).

F. Administration

- Workplan, reporting, budget submissions.

- Calls and Correspondence related to program.

- Special reports/consultation as requested.

- Coordination of contract casual employees.

- Special projects including completion of "Job Fact Survey" for Pay Equity.

IV CONCLUSION

The work and assistance of many individuals who contributed to the success of programming is greatly appreciated - most notably, Mary Paquet, Micheline Gibson, Dawn MacKay, Phyllis Cipolla, Heather MacKenzie and Bela Casson. As well, the input and support of my Director and colleagues are gratefully acknowledged.

It is hoped that through the efforts outlined in this report, a significant impact on the agricultural industry of this province has been realized.

Promotion

Laurie K. Thompson, B.Sc., M.Sc.
Marketing Specialist

Introduction

It has been an exciting and challenging year with respect to the marketing of Nova Scotia agri-food products. Environmental issues and the safety of our food supply were major concerns in 1989 and will become even more important to consumers in the 1990's. This office continues to act a liaison between the producer and consumer and my current involvement with the Nova Scotia Agricultural Awareness Committee should provide an effective vehicle in delivering factual information to the consumer.

The following report is categorized as follows:

I Commodity Specific Promotions
II Consumer Food Shows/Trade Fairs/Exhibitions
III Trade Missions
IV Committee Work
V Presentations/Conferences/Workshops
VI Other

I Commodity Specific Promotions

Nova Scotia Potatoes

Together with Sonya MacKillop, I organized a kick-off luncheon in late June at the Dartmouth Holiday Inn. Approximately 25 guests attended including potato growers, wholesalers, retailers and government officials. The Hon. George Archibald spoke to the group and encouraged the industry to start branding potatoes as to variety.

I also organized a media tour to the farm of Earl Kidston and to see a potato harvestor in action. The group also stopped at the Kentville Research Station to look at research trials and potato cultivars. Unfortunately, our ATV camera crew backed out at the last minute but we did get good coverage from a CBC radio reporter and Marie Nightingale of the Halifax Herald. Cheryl and I also helped to develop the cover for a new potato recipe brochure.

Maple Syrup

Bela Casson was hired to develop a foodservice promotional program for maple. The idea was to tie in a visit to a sugar bush with an escape weekend in March/April. In March of 1990, a get-away weekend at Keddy's was advertised. Unfortunately the weather was uncooperative. However, the maple was a hit with the dining room.

I met several times throughout the year with the Board of Directors and the promotion committee. The majority of discussion centered around the development of a maple syrup co-op in Cumberland County. Avard Bentley and I had consultations with Fred Pierce, Director of Cooperatives, and Doug Rosenthal,

External Trade. Late in 1989, the terms of the coop were drawn up and five signatures were obtained. The project was put on hold until after the 1990 season.

I gave a promotion report at the annual meeting in January. The new "Maple Blueberry" recipe booklet was distributed. Copies of the "Maple Industry in N.S." report were distributed as well.

I worked with Albert and Shirley Ripley in their design of a maple gift pack as well as Mark Cleveland in developing gift baskets.

Wild Blueberries

The Department cooperated on a fresh promotion again in August of '89 and this time we chose 10 IGA stores in the metro area. The response from Bolands was good and the Produce Managers showed more enthusiasm this year in merchandising the berries. The winning store was Bayers Road and a commemorative plaque and a $150.00 cheque were presented to the Produce Manager compliments of BPANS. In all, 9 tons of wild blueberries moved through Boland's distribution warehouse during the 2 week campaign. The potential for greater fresh sales is virtually untapped.

I participated in a WBANA fresh promotion in Boston during the month of September. Wild blueberries were introduced to Bostonians at Fanueil Hall and press conferences and news releases were targetted to an influential audience. I was interviewed for a Boston paper and set up a radio interview with CBC's Maritime noon. Press releases were sent out following the event to several Nova Scotian papers.

Fernande Belliveau, N.B., Nancy George, P.E.I., and I developed a press package to coincide with an IQF wild blueberry promotion in February 1990. Oxford Frozen Foods supplied the berries and there was an attempt to tie in pure maple syrup where possible.

I also attended a couple of WBANA domestic promotion meetings. Heather MacKenzie and I spoke to BPANS annual meeting in November.

Lamb

Cheryl and I helped develop 'LOCAL LAMB" signage. Fresh Nova Scotia lamb was given some exposure during the summer consumer 'Taste' program.

Rabbit

Sheila and I worked with the Commercial Meat Rabbit ASsociation in developing new literature and food photography. I encouraged the Association to participate in Harvest Food Fest '89 and the members were extremely pleased with the consumer response to the product.

Goat's Milk

I met with Morgan Palmer of Elm Avenue Dairy and Maxine Joyce, producer, to discuss the market potential for goat's milk and goat's milk products. AFDA and MAP applications followed which asked for funds to support a consumer awareness campaign.

Commodity Meetings

I called information/planning meetings 3 - 4 times throughout the year. We are very fortunate in Nova Scotia to have such a good working relationship with the 15 agri-food commodity boards and associations.

II Consumer Shows/Trade Shows/Exhibitions

Garden & Patio 1989

This first year show was slow to get off the ground but eventually, enthusiasm grew and the Department threw it's support behind the event with a $2000.00 sponsorship contribution and a 50' display.

I worked with Dick Morton in designing the Department exhibit which consisted of a plant material display, agriculture awareness video theatre, information center staffed by horticulturists and a publication table. The NSAC occupied one booth space.

The NSDAM sponsored the show again in '90 with a $3000.00 contribution. Once again, we had 5 booth spaces and the exhibit closely resembled the '89 show.

APEX '90

I worked the WBANA display at APEX this year and was rather disappointed in our results. I recommended to George Wood that WBANA take a new approach to displays on a local level and perhaps consider new initiatives.

NASDA '89

Linda MacDonald and I attended the National Association of State Departments of Agriculture show in Boston, Mass. There was a high number of value-added products using maple syrup and honey and most products were described as "natural", "no additives", "100 percent pure", etc. We attended a seminar on "Food Trends Into The 2000's", an informative talk by Dr. John Morris.

Swing Into Spring '89 and '90

The Department coordinated displays at the '89 and '90 Swing Into Spring consumer food shows at the World Trade Centre in Halifax. In 1990, we added the apple cider press to the display in addition to the commotidy food sampling. The apple juice was a real treat for the 5000 - 6000 visitors.

The commodity promotion specialists were generally pleased with the set-up and enjoyed the shift work.

Harvest Food Fest '89

Linda, Heather and I were able to work quickly in July and August after finally deciding to proceed with the Department coordinated Nova Scotia agri-food exposition.

This major endeavor was well worth the many hours of planning and response from the 30 or so exhibitors was overwhelming. Keddys Truro Inn was very cooperative and have already booked space for the 1990 show.

In all, about 6000 people visited the show over the two day period with outdoor temperatures of 25 - 30 degrees C. In 1990, we hope to incorporate more agricultural awareness types of displays and solicit greater participation from the various branches.

Cape Breton Food Festival

This first ever food show in Sydney was held in late September 1989. Once again, the Marketing Branch purchased booth space (700 sq. ft.) and invited commodity groups to participate. In all, 13 agri-food products were represented and consumers were very anxious to get ahold of new recipe ideas.

The show organizers, Exposure Inc., still have much to learn about looking after their exhibitors but the consumer response to the show was very good.

Atlantic Winter Fair

The Department purchased 900 sq. ft. of exhibit space (250 sq. ft. of which was occupied by Department staff). The greenhouse specialist helped develop a container gardening display and Ray and I demonstrated the making of apple cider. Children were fascinated by the process and had the opportunity to crush apples themselves.

The commodity exhibits included beef, pork, lamb, turkey, chicken, eggs and apples. Samples were sold for a token 25 cents. Next year, we hope to develop a more educational agri-food display.

Newfoundland Food & Livestock Show

Dave Smith and I worked together to plan a NSDAM exhibit. Dave made arrangements with Farmers, Scotian Gold and Cobi Foods to sample their products.

CFWA

I assisted Peter Rideout with plans for the NSDAM exhibit. Sheila's newest agri-food photo was enlarged, mounted and offered as a prize.

III Trade Missions

Boston Bluenose Promotion

On September 13, 1989, the NSDAM shared a sailing on board the Bluenose. The Nova Scotia delegation consisted of the Hon. George Archibald and his wife, Brian Smith, Bruce Rand and Richard Melvin (King's Produce), Earle DeMerchant (Co-op Atlantic) and Leonard Sarsfield. I distributed name tags and information kits to the six New England produce company representatives on board and we served guests Sarsfield pies in addition to the regular seafood chowder, hors d'oeuvres and spirits.

NEBS and Boston Solo Food Show

The New Exporters to Border States program was coordinated by Frank Davis of the International Trade Centre in Halifax. Nova Scotia participants included:

Sparkling Springs Ltd.
Mr. Donair Ltd.

Cleveland Maple Classics
Robertson's Candy
Dover Mills
Peninsula Farms Ltd.

Frank Davis and I accompanied the group to Boston. The Consul General, Hon. Tom MacMillan, spoke to the group about the potential market in New England, a population base of 13 million.

We also heard from a U.S. Custom's broker, a Trade Commissioner with the Consolate office, and the NEBS coordinator in Boston.

The group attended the solo food show the following day in Randolph, Mass. Only one Nova Scotia company, Fancy Foods, was an exhibitor. There were 58 exhibits in total, most from Ontario and Quebec.

We visited a couple of supermarkets to comparison shop and made a contact with a natural food store with 70 outlets for maple products, bottled water and candy.

It seems that most Nova Scotia agri-food companies are still not export ready.

IV Committee Work

Field Crops Expo 190

I worked closely with Janice Lutz, Manager of Field Crops Expo, in developing press releases, information brochures and a registration package.

Sheila and I put together a slide/tape presentation which has been used throughout the year by farm organizations to promote the expo.

Nova Scotia Agricultural Awareness

I was nominated NSIA representative and commodity liaison on the Ag Awareness committee. Work to date has consisted of the development of a new "N.S. agri-food" brochure, fact sheets for all commodities and county brochures.

I have worked with Cheryl in the development of a logo for Nova Scotia Agricultural Awareness and most recently have written a project proposal for AFDA funding which would see the development of 4 committee projects.

Nova Scotia Festival of Foods

The steering committee for the new video planned a video release on January 5, 1990. Key influencers in tourism, hospitality, media and government were in attendance. The video was shown at staff conference. Tourism has agreed to distribute the tape to its major Information Centres and Agriculture and Fisheries will distribute tapes upon request.

Maritime Pork Conference

As member of the Publicity and Registration Committee, my duties included writing press releases, ordering signage and putting together the registration packages.

I registered participants for the 2 day event, November 17 and 18, 1989 in Moncton.

Farmers Markets Association

I attended two promotion committee meetings and the annual meeting of the Association in 1989. We interviewed and hired Allyson Lobban to act as coordinator of the markets. I also assisted in the development of a marketing/promotion plan for the 1990 season.

Atlantic Fresh Produce Association

I attended a couple of meetings of the AFDA retail sub committee to discuss Maritime produce promotions. The 1989 carrot promotion was held in October and once again a donation was made to the Canadian Cancer Society from retailers, wholesalers and growers.

The National Potato campaign was less successful in the Maritimes but nevertheless, made some money for cancer research and created a greater awareness of the potato and its important role in the diet.

V Presentations/Conferences/Workshops

NS Department of Tourism's Information Centers

I made a presentation to the Mangers of the N.S. Tourist Information Centres at their annual meeting in 1989. The summer consumer "Taste" program was outlined and many centres showed an interest in having the van visit their centre.

Farm Fresh Marketing Association

I was guest speaker at their annual meeting and gave an overview of food trends and spoke about how to effectively advertise and promote direct markets in Nova Scotia.

Colchester County Farm Women's Workshop

I spoke to a group of 30 farm women on the topic "Promotion of N.S. Food Products".

PEI Marketing Conference

Ray, Shelley and I attended the 2-day conference in Charlottetown. Keynote speaker, Dr. John Morris, spoke about "Marketing For Success".

Marketing Seminar - Ornamental Industry

I attended this one-day seminar at the Airport Hotel led by Ian Baldwin. He encouraged the listening audience to use creativity in merchandising plant material inside and out and to always treat the customer with respect.

Program Planning Workshop

Linda and I worked with workshop facillitator, Doris Gillis, in planning a 1-day workshop for commodity promotion specialists. The participants were

encouraged to use the program planning process in their work setting and develop marketing strategies that would be most effective.

Media Workshop

I attended an NSHEA sponsored media workship in September. The consultant was very good, helping participants understand the importance of using a hook that the media will pick up on and on how to get your message across.

The Safety of Our Meat Supply

Dr. Ronald Ball, University of Guelph, spoke to students, NSAC staff and other interested individuals at a presentation during February's Meat Month campaign.

VI Other

Taste of Nova Scotia (Consumer) Program

I supervised 2 promotion assistants during the 4 month consumer taste program. Arlene Stevens and Elaine Ells proved to be good agricultural ambassadors travelling to several high traffic locations throughout Nova Scotia and passing along information about local agri-food production.

Locations visited included Amherst Tourist Information Centre, Halifax Information Center, Upper Clements Theme Park, Wood Islands Information Centre, P.E.I., Blueberry Harvest Festival, Sydney Coop store and Sobey's Food Warehouse in Truro.

Marketing Assistance Program (MAP)

I administered the program and received applications from organizations. A summary of assistance granted in 1989-90 is attached.

Agrologist In Training Program

I am nearing the end of my training period after having attended workshops on professionalism, marketing and production.

Skyline Displays

I ordered an 8' x 10' Mirage display unit for the Branch which is intended for use at trade shows outside the province and at home. The unit is portable and gives a very 'polished' look.

NSDAM Advertising

I coordinated Departmental advertising, answering over 30 requests during the year. Cheryl and I work together to develop the ads and when photos are required, Sheila always comes to the rescue!

Nova Scotia's Agriculture and Marketing Update

The radio program continues as a three minute interview series. In 1989 - 90, I conducted 74 interviews and presented 4 monologues.

Summary of MAP Funds Allocated 1989-90

Commodity Boards/Assoc.	MAP Funds
Pork Nova Scotia	$7650.00 (Feb.)
	3500.00 (July)
Sheep Producers Association of N.S.	7000.00 (March)
	1838.00 (Nov.)
	1218.00 (March)
N.S. Cattlemen's Assoc.	4400.00 (Sept.)
	3000.00 (Oct.)
	2200.00 (Jan.)
	13000.00 (March)
Greenhouse Growers Assoc. of N.S.	7200.00 (March)
Strawberry Growers Assoc. of N.S.	7000.00 (July)
	3000.00 (March)
Maple Producers Assoc. of N.S.	5500.00 (Feb.)
Farm Fresh Marketing Assoc. of N.S.	5000.00 (July)
N.S. Egg & Pullet Producers Marketing Board	4435.18 (March)
Blueberry Producers Assoc. of N.S.	2000.00 (July)
	3000.00 (Feb.)
Fox Breeders Association of N.S.	4425.00 (March)
Vegetable & Potato Producers Assoc. of N.S.	1200.00 (Sept.)
	305.48 (Oct.)
N.S. Potato Marketing Board	1140.00 (July)
N. S. Fruit Growers Association	5712.30 (Feb.)
Dairy Goat Assoc.	6000.00 (March)
Horse Industry Assoc.	2700.00 (March)
Sphagnum Peat Moss Assoc.	750.00 (Jan.)
Swine Breeders	478.25 (Nov.)
Maritime Limousin Assoc.	400.00 (Sept.)
Lawrencetown Farmers Market	400.00 (July)
Rabbit Producers Assoc.	250.00 (Oct.)
Wild Blueberry Association of N. A.	12000.00 (March)
Inspected Meat Plants Assoc. of N.S.	3000.00
TOTAL	$119,702.2

AUDIO VISUAL

AV Production/Technology

Sheila Ferguson
Information Officer

I. INTRODUCTION

Over the past twelve months, the Audio Visual Unit has experienced growing pains. As the total Department strives to increase their visual awareness, we have spread the professional abilities rather thin. We were pleased with the keynote address Dr. William Boldt presented at this years Staff Conference, and we feel our attempts at departmental productions and visual identity are in the same ball park as Boldt referred to.

Over the course of the next few months we will attempt to put together a policy statement that will provide the production unit with guidelines so we can better serve our clientele. As stated in last years annual report, "we strive to keep abreast with the ever changing technology present in the production industry". As we meet the challenges of the 1990's, we find the production unit in pretty good shape as far as equipment is concerned, now we must work on a departmental priority schedule.

II. PHOTOGRAPHY

A. Slide Library

As stated in previous reports, the demand continues to increase for use of slide library materials. We are seeing a greater emphasis put on presentations - using "live" slides and computer generated materials. We manage to squeak by with present requests, but realize our resources must be restocked over the course of the next few years.

Throughout the fiscal year this office continued to fulfil requests from the slide library. With a total of 32 requests, 417 slides were loaned for the use in slides shows, presentations, printed materials, etc. as well as duplication.

Requests were filled for the following Clientele:

Dept. of Industry, Trade and Technology
Atlantic Insight
Strawberry Harvester & Nursery Stock
Forage Presentation
P.E.I. Marketing/Agriculture office
American Cookbook
Scott Maritime
N.S. Agri-Food Industry
Don Cameron/Laurie/Brian
Susan Williams
Bob Murray
Bill Thomas
Elizabeth Grimmet
Raylene Nash
Jeannie Cruikshanks
Tracey Morrison

Government Services	Ned Norwood
Atlantic Insight	Susan Williams
Scotian Gold	Elaine Ells
Blue Magic	Doug Mathewson
Staff Conference	Arnold Rovers
W.B.A.N.A.	Peter Rideout
Landscape Horticulture	Paul Grimm
Maple Producers Annual Meeting	Ralph Murray
Remote Bulletin Board Lecture	Shelley Manning
Agrologist Presentation	Charles Thompson
Water Conservation Lecture	Dennis Moerman
Direct Market & Roadside Markets	Shelley Manning
Extension Newsletter	Jim Neary
Agric. Careers - Student Presentations	Brian Crouse

B. Studio Assignments

The area of studio food shots has seen the most advancement and improvement over the past few years. As a result of a food photography seminar taken in February, 1989, several significant changes have been made in our studio; the results speak for themselves.

The lighting system has been completely changed; no direct lighting is being used. We are using bounced lighting and a flash meter. Studio props were built for the Agri-Food shot consisting of pine wall and floor panels. These panels have been designed for booth displays at food festivals throughout the province. We negotiated with two of the local china stores to borrow props, some of which were used in the strawberry and blueberry projects.

To meet the growing awareness and promotion of our red meat sector plans are underway to photograph a campaign featuring "red meat".

In 1989 a total of thirteen assignments were completed; on average each project consumed two days for a total of 26 days. The exception was the Agri-food industry shot which took five days to line up and gather superior food product and props. This shot has been enlarged to 30"x 40" prints and is featured as the centre panel on the Branch's new mirage display.

A brief description of the studio assignments are as follows:

Lamb Shot - For use on the cover for a lamb brochure. Also enlarged to a 16"x20" for use at APEX.

Strawberry Project - A range of shots were completed for this year's strawberry campaign; posters, table tent, menu clip-ons, placemat, etc.

Blueberry Project - Developed for a proposed Blueberry-Patch brochure. Five 16"x 20" enlargements completed for WBANA booth display. Ten 16"x 20" enlargements for display at the Blueberry Patch - Amherst border.

Agri-Food Shot - A representation of all agricultural commodities; a 30"x40" print used for centre mirage display as well as on the cover of brochure entitled "Nova Scotia's Agri-Food Industry."

Apple/Pear - A cover shot was completed for a recipe brochure.

Bedding Plants & Container Gardening Shots - A collection of five 16"x20" shots were completed for a new booth for Greenhouse Growers Association, Bev McPhail.

Rabbit Producers Food Shot - A 16"x20" food product shot was produced for Harvest Food Fest '89.

Blueberry-Maple Cover Shot - A cover shot for "A Natural Connection, Blueberry-Maple" recipe brochure was completed. (Laurie, Cheryl)

Foodservice Apple Promotion - A photo shot was developed for menu clip-ons and tent cards. (Linda, Cheryl)

Plant Industry Branch - ID photos were taken for a "Branch Tree" style pamphlet under production for the Crop Expo '90 booth display. (Jim Goit, Dennis Moerman).

Mechanical Strawberry Photo/Blueberry Harvest Shot - Photos were developed for a press release and Board room posters. (Peter Swinkles, Bob Murray)

Beef Test Stations - Several photos were shot for the cover and panels for the pamphlet - "The Maritime Beef Cattle Test Station". Project Coordinator - Bruce Pettipas.

Extension News Cover Shots - A selection of five cover photographs were shot during spring and summer months for suggested cover shots for Extension News. (George MacKenzie, Yvonne Thyssen-Post).

C. Location and Press Assignments

Location and press assignments continued to grow in leaps and bounds. As the total Department of Agriculture and Marketing staff strive to become more visually aware, the workload also increases. The majority of staff who are giving presentations rely heavily on either the slide library or having location shots taken.

Press assignments increased over the past year; this, I believe, is due to the overflow within Information Services, Halifax. The hiring of a parttime photographer in Information Services should rectify this situation.

We continue to support the efforts of the Department staff members, but we are finding it increasingly hard to meet the demands of the entire Department. Over the course of the coming year we will be developing a policy statement that will give us direction so we can meet the demands of our clientele.

Location and press assignments account for 44 jobs. The following list will give an indication of the projects being covered:

Crop Expo - Plant Industry Branch (35mm slides & B&W press)
Honey Promotion shot (35mm slides)
Taste of N.S. release (Video & 35mm slides)
Coverage - Garden & Patio Show (35mm slides & B&W)
4-H Weekend Award Presentation (B&W press)
Young Farmer of the Year Award - Don Downe (35mm slides)
Commodity Yearbook - cover shot (35mm slides & B&W)
N.S. Agri-Foods shot (35mm slides & color separation)
Extension News (B&W press)

Fraser Nicholson - Beef Handling Management (35mm slides)
Canadian Sheep Classic - Roy MacKenzie (35mm slides)
Gazebo Opening & Garden Club Annual Meeting (35mm slides & B&W press)
Mechanical Strawberry Harvestor (35mm slides & B&W)
Red Steal - Fed./Prov. Strawberry Disease Project (35mm slides)
Maritime Beef Cattle Test Station - Bruce Pettipas (35mm slides)
Crop Expo - Press release (B&W press)
Double-Headed Blueberry Harvestor (Video & 35mm slides)
Mechanical Blueberry Sorter (1 - Video)
Fresh Pkg. Blueberry line (2 - 35mm slides & B&W)
Hudson Bay Fur Company (35mm slides & B&W press)
Apple Promotion shot (35mm slides & 6x7 transp.)
Harvest Food Fest - Keddy's (35mm slides & B&W press)
Yankee Cook-off - Apples (35mm slides & B&W press)
Extension News (B&W press)
Crop Expo (slide sound & B&W press)
Vegetable shot for Atlantic Winter Fair booth display (35mm slides/prints)
Annual Report cover shot (B&W)
Extension News cover shot (B&W press)
Banting Building shot (B&W)
Extension News - round bale shot (B&W)
Cumming Hall shot (35mm slides & 6x7 print)
4-H Scholarship Awards (B&W press)
Staff Conference - new staff shots (35mm slides)
Staff Conference - entertainment (35mm slides)
Staff Conference - Livestock display (35mm prints)
Career Fair, N.S.A.C. (35mm slides & B&W)
Agrologist Award, N.B. (B&W press)
Bull Test Station (35mm slides)
Dairy Focus - 3 farms (35mm slides)
W.I. Annual Meeting (35mm slides)
Maple Press Release (B&W press)
Pesticide Storage (35mm slides & 6x7 transp.)
Limestone Pamphlet (35mm slides & 6x7 transp)
Meat Month Reception (35mm prints & B&W press)

D. Photo Enlargements

As we produce more studio work, and the quality of the photographs improve, we have had requests to enlarge photos for clientele from the Department and outside requests. The following requests have been made:

Oxford Frozen Foods - collection of 4 blueberry shots
Industry Trade & Technology - selection of Nova Scotia product shots used in mock-up for international trade brochure.
Strawberry Growers Association - selection of photographs used for gifts at annual meeting.
Wild Blueberry Association - a selection of wild blueberry shots have been enlarged and will hang as part of the presentation housed at the Blueberry Patch - Amherst border. The collection consists of ten 16x20 inch enlargements.
Royal Bank of Canada - shot of Blomidon Look-off for presentation to a guest speaker - Jim Houghton
Canadian Fruit Wholesalers Association - for a door prize 16x20 inch shot of Agri-Food Industry - Peter Rideout
Blue Magic Industry - Doug Mathewson (Blueberry transparency)

E. Copy Stand Assignments

A small amount of copy stand shots were completed during the past year. These range from Vericolor, Lith copy (to be used as a line negative) and Tungsten film (used to copy documents, etc.)

Vericolor	206 slides produced
Lith/Line Negatives	50 slides produced
Tungsten	75 slides produced

III. VIDEO RELEASES

Nova Scotia's Festival of Foods

Late in the fall of 1988, Laurie Thompson put together a video proposal which would incorporate the Departments of Tourism and Fisheries. Nova Scotia hosts over 400 food related festivals each year. We, in agriculture, realize the potential market for agri-food related products through the various festivals.

After several meetings, and written budget commitment from the Departments of Tourism and Fisheries, a steering committee was named, and we were on our way to produce an exciting, up beat, fun video featuring Nova Scotia food products. The video production, Nova Scotia's Festival of Foods, was designed to meet the following objectives:

1) To create a greater awareness of the important role Nova Scotia agri-foods play in local festival, tourist attractions and the hotel and restaurant trade by highlighting a variety of festivals and community events which revolve around the consumption of locally produced foods. (i.e. Apple Blossom Festival, Blueberry Harvest Festival, Scotsburn Pork Barbecue).

2) To expand the market for Nova Scotia agri-food products by exposing more people (tourists and local residents) to the variety of locally produced foods which are available throughout the province.

The audience was named - the travelling public, be they tourist or Nova Scotian's, and the distribution would be completed through the following channels:

Nova Scotia Tourist Information Centres
Nova Scotia Museums
Local Cable TV Stations and ASN
Travel Agencies and Convention Planners
Trade Missions - e.i. Sea Sell

The Departments of Tourism and Fisheries are responsible to distribute copies to their respective clientele. To date we, in agriculture, have distributed 30 copies of the program.

The video runs approximately 8 minutes in length and a total of 11 agricultural related events, 4 fisheries events and 2 cultural events.

Approximately 35 shooting days were committed to the project. All out-footage (stock) has been time coded and will be accessible for other agricultural related productions.

To the many Department staff who assisted in one way or another, we thank you all.

When one agrees to produce a video such as this one, you wonder if the objectives will be met. As producer and director of the "Nova Scotia Festival of Foods" video, I have been well satisfied with the results.

Mechanical Strawberry Harvester

A five-minute clip was produced on the mechanical strawberry harvester featuring the picking/cleaning heads and the row elevation sensor system. Due to a lack of funding (narration/sound track) sound was not added to the production.

This production involved two shooting days. To date, the clip has been shown several times - Strawberry Growers Annual Meeting, Staff Conference '90, North American Strawberry Growers Annual Meeting and the New England Fruit and Vegetable Convention. The video has been used to show independent strawberry growers in Winnipeg and Quebec the versatility of the unit.

The video was produced for Bob Murray, Strawberry Specialist, Plant Industry Branch.

Current Video Productions

Sheep Industry Video - As part of a new and enhanced home study course in sheep production, the Nova Scotia Department of Agriculture and Marketing, in co-operation with the Sheep Producers Association of Nova Scotia have tendered a video proposal. As a consultant to the video production committee, it is my function to advise the committee on technical production, shot list, sequencing of shots, location shooting/lighting, story board and post editing structure.

Nova West Production was awarded the tender and we are working with Government Services on contents of contract and rights to stock footage.

Strawberry Nursery Plant - A video proposal from Bob Murray on the promotion of Nova Scotia strawberry nursery stock. This project has received AFDA funding and will not go to tender, but will be handled by an independent producer. I will act as executive producer and consultant.

Nova Scotia Dykelands - A similar situation to the Strawberry Nursery stock video; monies have been received from an AFDA proposal, due to the fund, Government Services has agreed to allow our Department to handle the contracting of this project - no tender involved. A letter of agreement will be signed by an independent producer and the Department will retain all rights to stock footage. Again, my role will be to act as executive producer. We also plan to do a paper edit of the video prior to post production studio is hired - due to small budget.

IV. SLIDE SHOWS

Crop Expo '90

A single projector slide show was completed and transferred to video. Crop Expo '90 is a promotional series, designed to inform interested persons what will be offered during the three days of Crop Expo. It was a challenge to produce an interesting, promotional package on an event that does not take place until July 15-18, 1990. The series was developed to accompany members of the Expo Steering Committee as they made the rounds speaking to Annual Soils & Crops Meetings, Federation of Agriculture Anuual and County Meetings. By having the slide series transferred to video it allowed the package to be presented to all four Atlantic Provinces' Federation Annual Meetings.

V. SEMINARS ATTENDED

A three-day video seminar was offered to agricultural employees from the Maritime Provinces. This was an excellent introductory course, and will give me a contact person from each Branch to try and channel in-house video productions. The course was offered twice, and was coordinated by Lauranne Sanderson and put on by Prisma Productions Ltd.

A very intense video lighting seminar was offered at MITV Broadcast Studios in Dartmouth. The seminar was sponsored by ROSCO of Canada Ltd.

VI. CONFERENCE COORDINATOR

During the course of the past year I have acted as audio visual conference coordinator for the following conferences:

Staff Conference (Cheryl, Bruce)
Dairy Focus '90
Direct Marketing Challenges '90

Graphic Design

Cheryl Kienzle
Graphic Artist

I. INTRODUCTION

The primary responsibility of this office is to produce visual aids and materials to enhance projects and programs associated with Marketing Development in addition to providing assistance to the remaining sections of the Branch. This office also responds, as time and workload permit, to numerous requests throughout the N.S.D.A.M. and related agricultural organizations.

The following report outlines some of the projects undertaken for the period April 1, 1989 to March 31, 1990.

II ACTIVITY REPORT

The table below was compiled based on written reports throughout the fiscal year. It should be noted that several requests were too varied and insignificant to categorize, therefore, the data is by no means inclusive. The data is only a representation of frequency of specific services provided and not time spent on each.

	MARKETING	OTHER NSDAM	NSAC	AGRI-RELATED GROUPS	OTHER	TOTAL FREQUENCY
Office Consultations/ Meetings, etc.	23%	51%	13%	8%	5%	128
Design Layout/Mock-Ups:	43%	27%	18%	11%	-	99
Cameral Ready Art/Mechanicals:	42%	25%	19%	14%	-	86
Hand Drawings, graphs, etc.:	27%	33%	6%	21%	12%	33
Signs/Posters/Cards/Tents:	42%	20%	-	37%	-	171
Lettering/Setting Type:	16%	42%	38%	4%	-	45
Computer Graphics:						
Files - for slides/overheads	21%	69%	7%	-	2%	581
Slides produced -	38%	47%	11%	-	5%	586
PMT's	44%	15%	14%	27%	-	176

III PROJECT HIGHLIGHTS

A. Trade Shows/Promotions

Through the co-ordination of the Marketing Specialists, graphic services are provided to agricultural commodity associations, boards and related groups. During the year, an array of table-top tents, recipe cards, signs, posters,

etc. were created for use at promotions and trade shows. Some of these are listed below:

- Swing Into Spring
- Maritime Pork Conference
- Harvest Food Fest '89
- APEX
- Garden & Patio Show

B. Advertisements

This office fulfilled requests for ad design in numerous agricultural publications, magazines and newspapers. Several ad topics pertained to the following: Blueberry-Maple, Taste of Nova Scotia, Red Meat Industry, Maple Festival Suppers, Sheep Producers Assoc. of N.S., etc.

Once again, assistance was provided to the summer students in the production of the N.S.A.C. Calendar Blotter. A total of 14 new ads were layed-out and made camera-ready to add to the calendar before printing.

C. Logo Designs

Each year, new projects and programs lead to the development of logo designs. The following is a list of logos developed throughout the year.

1. Harvest Food Fest '89
2. Fresh Nova Scotia Lamb
   - originally designed to be used as an in-store shelf liner, the design was modified into a sticker to be used as an integral part of the meat packaging.
3. Canadian 4-H Council Annual Meetings
   - this logo was designed for Nova Scotia 4-H, for the annual meetings to be held in Nova Scotia this year.
4. 4-H Craft Leaders Workshop - designed for Home Economics Section
5. N.S. Forage Council - designed for use at the Field Crops Expo '90.
6. 4-H Apron design
7. Agricultural Awareness - a couple sample designs were created, however, work is still continuing on the development of a final logo.
8. Armstrong Select N.S. Beef - several logos were designed for a test marketing pilot project for "branded" Nova Scotia Beef. Eventually one of the logos was chosen and developed into in-store promotion materials; a shelf liner, a "wobbler" and stickers.
9. Lapel Pin - "Nova Scotia Agriculture"

D. Taste of Nova Scotia Program

Graphic assistance was provided throughout the summer to the staff hired to travel the province promoting N.S. food products in the form of signage, and misc. handout information. A "Taste of Nova Scotia" brochure was designed and completed for use in this program as well.

E. Brochures/Assistance

1. Field Crop Expo '90 - in the final stages before printing, assistance was provided to the Field Crop Expo Committee in the development of the brochure promoting the event.

2. Maple Festival '90 - information and graphics were prepared to complete the brochure listing the Maple Producers and Maple Festival Suppers. In conjunction with the festival, a poster/flyer was designed for the "Maple Magic Weekend promotion.

3. Strawberries - a placemat was designed for the Strawberry Growers Association. Also, a brochure was developed in which this office provided assistance with the cover.

4. Potatoes - a brochure was developed in Kentville and this office provided assistance with a cover design and camera-ready artwork.

5. Sheep Producers Assoc. of N.S. - a recipe brochure was compiled and prepared for printing, however, it awaits further development in regard to the cover photo.

6. Agri-food Commodity Yearbook - the cover was prepared by this office.

7. Staff Conference Brochure - the cover was prepared by this office.

8. "A Natural Connection" Blueberry-Maple - a recipe booklet was compiled and prepared for printing. The cover was also designed and developed with the assistance of Sheila Ferguson of this office.

F. Foodservice Promotion

Meat Month & Restaurant Month:
Once again, assistance was provided with the "Meat Me For Lunch" campaign. Work was much less extensive this year as last years' materials were updated and reprinted.

Egg Promotion:
A tent card and entry forms were designed and prepared for printing for use in an institutional foodservice promotion.

Maple:
A maple menu clip-on was designed and prepared for printing.

Pork:
A tent card insert and menu clip-on was designed for use during a "Return of the Acadians" promotion in the Valley.

Apple:
With the photography assistance of Sheila Ferguson, an apple tent card was designed for general purpose use.

IV. CONCLUSION

This past fiscal year can best be described as another adventure in the continuing quest to achieve the utmost in serving the marketing interests of the Nova Scotia agri-food industry. Although the general purpose remains the same each year, new approaches and ideas create challenging projects in the graphics field. It is my hope, with the support and contributions of my colleagues, that our efforts continue to play an important role in the agricultural industry in Nova Scotia.

Radio/AV Services

Micheline Gibson
Audio Visual Technician

I. Video and Audio Dubs (copies):

This fiscal year there were 282 video copies and 86 audio copies reproduced. Also, I received requests to pulse and synchronize 4 slide shows. Two of these shows were recorded and edited in our recording facility.

II. Inventory:

As part of my duties, inventory equipment checks are conducted on regular basis along with deletions and additions to the inventory.

III. Bulk Purchase Order - AV Supplies:

Once a year, this office coordinates a bulk purchase order for AV supplies for all Department Branches. This year, the total cost of the supplies was $12,622.63 of which $9228.70 was charged back to the various Branches through a system of inter-departmental invoicing and processed by the accounting department.

IV. Recording Services:

Interviews:

This year, there were 448 recording sessions, which were edited for errors and also adjusted in length to stay within the allocated time frame. I have scheduled, researched and prepared information and tentative questions which were submitted to the interviewers.

74 interviews with Laurie Thompson, Promotion Marketing Specialist and guests.

15 interviews with Richard Sparkes, Information Officer, N.S.A.C. and guests.

4 (Trees & People) - Orville Pulsifer

16 others

Monologues:

Nova Scotia Garden Guide Series	144
Interviews	109
Gail Keddy, Home Economist	52
4-H Representatives	52
Agricultural Representatives	52
Trees & People Series	17
Misc. Recordings	22

Radio Tape Reproduction:

A total of 1078 reel-to-reel tapes were produced this year and mailed to the subscribing radio stations throughout the province.

Nova Scotia Garden Guide Series		
5 cuts per tape weekly		
for 26 weeks	=	390
promo tapes		12
Nova Scotia Agriculture & Marketing Update		
4 to 6 cuts per tape weekly		
for 52 weeks	=	624
Agricultural Representatives		52

Nova Scotia Garden Guide

This is the 12th year for this very popular series with Orville Pulsifer as narrator. The typing of scripts on letterhead and box covers are also a part of the final production process by this office. Also, a cassette of each broadcast is produced and forwarded to Dick Morton for loan-out to the garden clubs throughout the province.

Trees & People Series

As of January 1st, 1990 Canada Forestry Services has joined the Nova Scotia Agriculture and Marketing Update with a weekly radio series. Their format consists of 3 monologues and one interview per month. Orville Pulsifer is the narrator and interviewer. This series is also recorded in our recording facility.

V. Audio Visual Equipment

This office provides instructions and assistance in the use of audio visual equipment and their functions on a regular basis. As part of my duties, 925 pieces of returned A/V equipment were checked and cleaned.

Minor equipment repairs	14
Troubleshooting calls on campus	8
Set up of A/V equipment	11
Video Cassette Loans - Dept. staff	48
- N.S.A.C. staff	18

Equipment Loans

	DEPARTMENT		COLLEGE		TOTAL	
	SHORT	TERM	SHORT	TERM	SHORT	TERM
Cameras	29	3	13	--	42	3
Ringmasters	34	--	11	6	45	6
16mm Projectors (film)	8	1	13	12	21	13
35mm Projectors (slides)	140	--	36	3	176	3
Overheads	88	1	30	6	118	7
Sound Systems	46	--	28	--	74	--
Tape Recorders	30	5	17	10	47	15
VCR-TV-Microwave	15	--	2	1	17	1
Screens-Flip Charts Carts-Ext. cords, etc	269	3	58	7	327	10
TOTAL	659	13	208	45	867	58